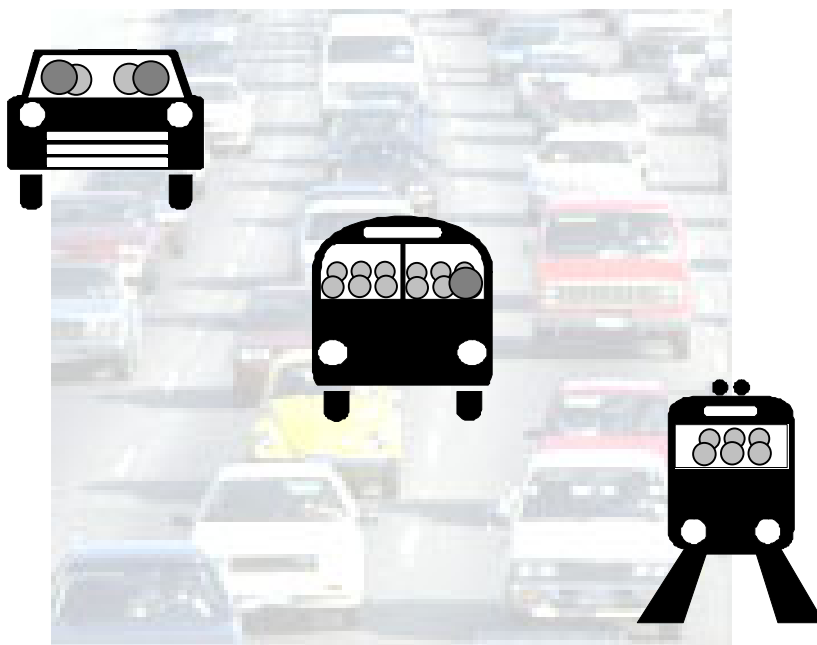




METROPOLITAN TRANSPORTATION COMMISSION

Regional Rideshare Program Performance Audit

Final Report



March 2003

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Chapter 1. Introduction

The Metropolitan Transportation Commission hired Nelson\Nygaard Consulting Associates to conduct a performance audit of the San Francisco Bay Area's Regional Rideshare Program. The Regional Rideshare Program is administered by RIDES for Bay Area Commuters, Inc. through a contract with MTC. The contract is funded through a cooperative arrangement among the nine Bay Area counties.

The purpose of the audit is to:

- Determine how the Regional Rideshare Program can better add value to regional efforts to reduce single occupant vehicle trips,
- Determine stakeholders' concerns about the program
- Assess the program's monitoring and evaluation strategies,
- Determine how the program can best convey the value of its services, Determine whether the program is meeting its objectives, and
- Make recommendations to address stakeholder findings.

To achieve the audit's purpose, the audit team conducted a peer review of four other regional rideshare programs, reviewed the program's monitoring and evaluation methodologies, interviewed the program's funding partners, interviewed several RIDES' board members, interviewed MTC staff, surveyed and interviewed employers, and reviewed program deliverables. Chapters 2 through 7 of the report explain the outcomes of each of these tasks. Chapter 8 coordinates and summarizes all the issues discovered through each of the different tasks. Finally, Chapter 9 provides recommendations for the regional rideshare program.

Chapter 2. Peer Review

1. Introduction

This chapter details the results of a peer review of Regional Rideshare Programs, examining four programs in detail:

- Southern California Rideshare – Los Angeles Region
- South Florida Commuter Services – Miami Region
- Commuter Connections – Washington, D.C. Region
- MetroPool – Stamford, CT Region

In addition, we briefly examined the program in King County, WA (Seattle Region), specifically looking at the impact of their new ridematching software, which RIDES for Bay Area Commuters is planning to implement.

This chapter is structured thematically, rather than taking each individual program in turn. After a summary of the key findings, each theme is treated in order:

- Background and key characteristics of each program
- Functions of each program, including any unique features
- Client focus – whether employers, general public or both
- Evaluation and performance measurement
- Strategies to maintain database quality
- Impact of online ridematching services
- Competition and overlap with other agencies

Appendix A gives a complete list of the performance targets adopted for each agency.

2. Summary of Findings and Conclusions

The following broad conclusions can be drawn from this peer review:

- Outreach to large employers is accepted by all programs as the most cost-effective means of promoting ridesharing. However, this does not preclude general public marketing to complement and/or 'pave the way' for employer outreach, or the use of mass media to reach a business audience as in South Florida
- Most agencies set performance targets on the basis of what is realistic, given staffing and budget constraints. However, Commuter Connections in Washington, D.C. takes a 'top down' approach, determining the necessary emissions reductions and then the contribution that ridesharing will need to make to achieve this.
- There is a strong relationship between the nature of performance indicators and the relationship between the rideshare agency and its client or funders. Where there is close collaboration between the two – regardless of whether ridesharing is conducted within a government agency or external contractor – performance indicators are more a tool for the agency's own management. Where the relationship is more of a vendor-client one, performance measures alone are unlikely to be sufficient to satisfy funders of the quality and cost-effectiveness of work being performed.
- Most agencies aim to purge their database every 12 months, by recontacting people to see if they are still interested in carpooling.
- Online, real-time ridematching is forecast to have a major impact on ridesharing operations. As well as freeing up staff resources from data entry, it will refocus marketing efforts towards directing people to the website.
- None of the programs reviewed here report conflicts with TMAs or other local agencies. This is largely due to the weakness of those TMAs, and agreements that the regional agency will avoid their geographic area unless invited.
- There is a strong desire for rideshare programs to be perceived as 'more than carpool matching agencies', providing people with information on all their transportation choices so they can make an informed decision.

3. Background

Figure 2-1 presents an overview of the basic characteristics of each rideshare agency in the peer review, and a comparison to RIDES for Bay Area Commuters. King County Metro is not included in the table, as the review of this agency focused narrowly on their experiences with the new ridematching software. The aim is to facilitate a comparison between different agencies, and therefore reporting years and the precise definition of terms such as “inbound calls” may vary.

Figure 2-1 Basic Characteristics

	RIDES for Bay Area Commuters	Southern California Rideshare	South Florida Commuter Services	Commuter Connections (DC)	MetroPool (Stamford)
Total Population in Service Area	7 million	14 million	5 million	c. 8 million	3 million
Focus of Rideshare Program	Mode shift from SOV	Air quality	Congestion reduction	Air quality	Congestion reduction and air quality
Regional Rideshare Program					
Operator	Contracted by RTPA to private nonprofit	In-house by MPO	Contracted by state DOT to private consultant	In-house by MPO	Sole sourced by state DOTs to nonprofit
Main Source of Funding	Counties	Counties	State DOT	States and DC	State DOTs
Budget	\$4,163,000 (1)	\$3,048,000	\$1,900,000	\$3,738,000 (2)	\$4,350,000
Number of Staff (excluding contractors)	40 (3)	47	9	7	17
Ridematch Database Approx. Size	13,000	400,000	14,000	18,000	2,300
Matchlists Produced per Year	21,814	26,400	N/A	15,271	N/A
Weekly inbound calls answered	194 (4)	385	150	700	N/A

(1) Regional Rideshare Program budget. Does not include any additional external contracts.

(2) Including \$1.7 million for Guaranteed Ride Home and \$480,000 for Telecommuting.

(3) Not all staff members are funded by the Regional Rideshare Program contract.

(4) Commuter referral calls only.

N/A – not available. This does not necessarily mean that the data are not tracked by the rideshare agency.

Southern California Rideshare

Southern California Rideshare (SCR) is by far the largest program in the nation, at least measured by database size. To some extent, this is largely due to regional air quality regulations, which require employers with 250 or more employees per site (100 or more in Ventura County) to submit annual reports on employee travel behavior – including average vehicle ridership (AVR). Employer site visits and the collection of ridematching information are often centered round these AVR surveys, which provides a ‘way in’ for rideshare staff to access large pools of employees. However, SCR also provides services to other employers, who are not subject to these air quality regulations.

SCR is funded by the five County Transportation Commissions (CTCs) in the region, and run by the Southern California Association of Governments (SCAG). SCAG has hosted the program since 1995 when Caltrans withdrew State DOT funding. Both SCAG and the CTCs recognize that SCAG, as the regional planning agency, does not provide the ideal home for a Regional Rideshare Program. Based on the outcomes of an organizational review, completed in February 2002, major changes are envisaged to SCR’s structure, including the following:

- Riverside and San Bernardino counties will cut ties to the regional program completely. They will take responsibility for ridematching themselves, hosting their own database.
- Staff responsible for employer outreach will become employees or contractors of Los Angeles or Ventura counties, instead of working for SCAG.
- Los Angeles and Orange counties will no longer fund the TranStar transit information software, as they believe it duplicates their own systems.
- The future of the in-house RideStar (ridematching) and TranStar (transit trip planning) software is uncertain. San Bernardino and Riverside counties have purchased the off-the-shelf RidePro package, while Los Angeles and Riverside counties are to issue an RFP to procure ridematching systems within the next six months.

SCR staff considers the effective breakup of the regional program to be a major loss, both in terms of the loss of experienced staff and regional continuity and coordination. If one county produces a better placement rate than another, for example, the tendency might be to demand that other counties imitate that program – regardless of whether it fulfils local needs. They point to Atlanta, which has run a similar decentralized program and is considering moving towards a more centralized model as a result.

South Florida Commuter Services

The South Florida program is run by a private consultant, Parsons Brinckerhoff (PB), under contract to the two local Florida Department of Transportation districts. PB took over the contract in September 2001 from URS/BRW, who had run the program for the previous five years. According to PB, they won the contract because FDOT wanted more innovation;

many of the previous program materials, for example, “looked like bank literature”. In turn, PB contracts out specialized tasks such as design and media relations to subconsultants.

Congestion reduction is the key objective of the rideshare program, since South Florida is no longer an air quality non-attainment area. Mode shift and vehicle trip reduction are considered important indicators of the success of the program.

Commuter Connections (DC)

Commuter Connections provides services to the Washington, D.C., Baltimore and Fredericksburg metropolitan areas. It is housed at the Metropolitan Washington Council of Governments, and funded by the District of Columbia and the states of Maryland and Virginia.

The program relies heavily on local staff for employer outreach, and also contractors, with only about seven staff in the regional offices. The aim is to coordinate the ridesharing efforts of local cities, counties and employers, through providing a uniform Commuter Connections branding and centralized functions.

Employer outreach in the Washington, D.C. metropolitan area (but not Baltimore or Fredericksburg) is funded by the regional program, but the money is passed through to ten local jurisdictions in the air quality non-attainment area. The jurisdictions hire their own staff or employ a contractor, and offer their own incentive programs. To receive this money, the jurisdictions have to provide a specific scope of work and goals.

According to program staff, the DC area program has gained a high level of support and buy-in from funders, unusual among other rideshare programs. This is attributed to a number of factors: the HOV lane infrastructure; the realization that expanding the highway system is not an option; the presence of the federal government in town; and because ridesharing is a cheap, effective option to move towards air quality conformity – and can be demonstrated to be so.

MetroPool (Stamford)

MetroPool is a private nonprofit, established in 1980, providing rideshare and other transportation services in Fairfield County, CT, and the six-county Hudson Valley region of New York. It holds separate contracts for more than 12 different projects, most of which are sole sourced from the New York and Connecticut Departments of Transportation. MetroPool also bids on projects released for competitive tender, such as its current vanpool demonstration program on the I-287 corridor.

While the bulk of its money comes from federal CMAQ funding through the state DOTs, and its employer services are provided free of charge, MetroPool also attracts a significant level of private corporate contributions. These amount to up to \$90,000 per year in cash, plus a further \$150,000 in in-kind contributions such as advertising space and staff training.

This funding is at least partly a reflection of MetroPool's corporate orientation, with a private sector Board of Directors, for example.

MetroPool's role is perhaps uniquely defined by its bistate location. Far more than any of the other programs here, it is much more than a rideshare matching organization. Since there is no MPO or other regional entity to match its service area, it plays a major coordination role, providing a forum to bring together different stakeholders. The organization seeks to be mode-neutral, promoting all forms of transportation equally.

4. Functions of the Regional Rideshare Program

Figure 2-2 sets out the various functions of each rideshare program. This is not intended to be a comprehensive list, but rather an indication of the scope of each program. In addition, the priorities listed are generally subjective ones, rather than formal priorities in a work program. For example, RIDES does not identify its work plan elements as either primary or secondary functions, and all elements are considered important to achieving program goals.

There are several functions that are common to all the rideshare agencies considered:

- **Ridematch services.** Most agencies see ridematching services for both carpools and vanpools as one of their top priority functions. The exception is MetroPool, which sees itself as a broader mode-neutral agency of which ridematching is just one part.
- **Employer assistance.** This is a top priority function for every agency, and is often seen as the most effective way to generate rideshare match requests and increase the size of the rideshare database. In some agencies – Commuter Connections and for some counties in the Southern California Rideshare program – employer assistance is decentralized and conducted by contractors or county staff.
- **Program website.** All the agencies reviewed maintain a website, although these vary in scope and utility. All, however, offer online ridematching services; even if they do not offer real-time online ridematching, they allow users to enter their details via the website for staff to reenter into the database. Most websites also offer cost saving calculators, transit trip planning services or links to transit agencies, and resources for employers.

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Figure 2-2 Rideshare Program Functions

	RIDES for Bay Area Commuters	Southern California Rideshare	South Florida Commuter Services	Commuter Connections (DC)	MetroPool (Stamford)
Ridematch services	♥	♥	♥	♥	•
Vanpool promotion/matching	♥	♥	•	° (1)	•
Transit information	♥	♥		•	•
Commuter Check (or equivalent) marketing	♥	•			•
Employer assistance	♥	♥ (2)	♥	° (1)	♥
School commute programs					•
Access to Jobs initiatives	♥				•
Media buys			•		♥
Other paid advertising (e.g. direct mail)					•
Guaranteed Ride Home			•	•	•
Program website	♥	•	•	•	•
Organizing regional events (e.g. Bike To Work day)	♥			•	•
Teleworking resources (3)	♥			•	•
Automated ridesharing information kiosks				•	
Newsletter		•		•	•
Public relations		•	•	•	•

Key:

♥ = Priority Function. Since RIDES does not prioritize its functions, all its activities are listed as priorities.

• = Other Function

° = Decentralized/Function Performed by Local Agencies

(1) Regional program provides support and training

(2) In Los Angeles and Ventura counties only

(3) MetroPool provides information and resources for employers to design telecommuting programs, as part of its wider employer outreach services. Commuter Connections provides more extensive teleworking resources through a dedicated Telework Resource Center, including marketing support for telework centers in the region as well as encouraging employers to establish or expand telework programs.

Southern California Rideshare

Southern California Rideshare highlights two unique aspects of the program:

- **The ‘RideGuide’** (see Appendix B for an example). In addition to providing clients with names of potential carpool or vanpool partners, a RideGuide offers personalized information on transit routes, park-and-ride lots and vanpools, and benefits offered by the individual’s employer. The aim is to be truly multimodal and present people with all their choices.
- **Software.** The program uses in-house, custom-built RideStar (ridematching) and TranStar (transit information) software. The TranStar software in particular provides a high degree of functionality compared to off-the-shelf programs.

The program is divided into two main work areas:

- **Core services.** These are funded by all counties in the region, and include ridematching services, evaluation studies and the 1-800-COMMUTE number.
- **Employer services.** Each county can ‘opt in’ and pay SCAG to provide employer outreach services. Los Angeles and Ventura opt in, San Bernardino and Riverside contract these out to a private firm, and Orange County provides no employer services. Orange County employers can pay a fee to receive assistance from SCR.

The top priority activities for SCR are RideGuide production, maintenance of the RideStar ridematch software, and employer Average Vehicle Ridership surveys. These AVR surveys, which are conducted to provide data for the annual reports on employee travel behavior required from large employers, help to generate RideGuide requests, since the same form is used for both the survey and RideGuide.

Another innovative program, implemented in Los Angeles County only, is ‘Rideshare Rewards’. Employees at participating companies who currently drive alone are offered \$2 per day in gift certificates, up to a maximum of \$120, for the first three months they travel to work by alternative modes. Commuters who have been ridesharing for six months or longer can join ‘Club Metro’, which offers discount coupons for restaurants and entertainment venues. Both Rideshare Rewards and Club Metro are open to employers with fewer than 250 employees at a worksite. They are free to employers; the only administrative burden to them is the collection and authorization of claim forms, and the distribution of gift certificates.

SCR staff considers a lack of paid general public advertising to be the main missing element from its work program. They point to the success of the \$4 million Team Rideshare campaign in 1993, which urged people to try ridesharing one day a week on “Rideshare Thursdays”. This campaign ran for an initial six months, and was revived for a further six months after the Northridge earthquake, and still produces a high level of recall seven years later.

South Florida Commuter Services

South Florida Commuter Services has two key work areas:

- **Employer outreach**, including the creation of an employer tool kit, with a CD-ROM and workbook, and presentations to employers
- **Ridematching**, including efforts to build the database size through paid advertising and telesales (cold calling)

The program no longer produces a newsletter, as the investment in time and money was not considered cost effective.

Commuter Connections (DC)

There are six elements of the Commuter Connections work program:

- Commuter Operations Center. This is the 'flagship' element of the program, providing ridematching services by web and telephone, and from client members.
- Employer outreach. This is largely decentralized, and conducted by local staff. However, the regional program provides training and support to local staff.
- A Guaranteed Ride Home program.
- Integrated rideshare. This program element largely consists of maintenance of ridematching and transit information databases, and automated InfoExpress kiosks which provide transit and ridematching information at locations such as shopping malls and major employers.
- Telework Resource Center.
- Cycling-specific employer outreach, including Bike to Work day promotion and coordination.

MetroPool (Stamford)

MetroPool has perhaps the widest range of functions of any of the programs discussed here. However, two areas stand out as particular focuses:

- **Transportation marketing**, including marketing for transit operators, with an emphasis on regional connections such as the creation of multi-operator regional transit guides
- **Employer assistance** with TDM programs, including surveys, ridematching, and custom-designed commuter mobility programs

MetroPool's marketing goes well beyond traditional media buys and direct mail. For example, it has hired a photojournalist to take pictures of people on buses and trains, with

the aim of producing a museum-quality traveling exhibition to take to corporate lobbies, libraries, and so on.

While MetroPool provides fewer matchlists than the other programs discussed here, it attempts to provide a high degree of follow up assistance. Staff attempts to call all individuals receiving a ridematch list within one month. As well as serving as a reminder, they can review transit options and provide detailed transit itineraries, which are currently not included on the matchlist itself.

5. Client Focus

Figure 2-3 Client Focus Areas

RIDES for Bay Area Commuters	Not specified
Southern California Rideshare	Employers
South Florida Commuter Services	Employers
Commuter Connections (DC)	Employers
MetroPool (Stamford)	Employers and General Public

Southern California Rideshare

SCR focuses almost exclusively on employer outreach to generate RideGuide requests. In FY 1999/00, 91% of RideGuides were generated directly from employers, with the remainder from telephone calls (8%) and via the web (1%). To a great extent, these employer-generated RideGuides result from the annual Average Vehicle Ridership surveys that many employers in the South Coast Air Basin are required to conduct in order to comply with air district regulations. General public marketing is not considered to be as cost-effective, since it cannot be as effectively targeted on peak-hour commuter trips as through working with employers, and there is not the same direct access to employees as through AVR surveys. The large number of media outlets in the Los Angeles region also increases the cost of general public marketing, according to SCR staff.

The effectiveness of employer outreach in generating ridematch entries can be clearly demonstrated, according to SCR staff. San Bernardino and Riverside counties, which contract with local providers for employer outreach, generate similar numbers of RideGuide requests to Los Angeles and Ventura counties, which provide these services through SCAG. Orange County, which does not fund employer services itself, generates considerably fewer RideGuide requests.

Until recently, most of SCR's outreach was focused on large, regulated employers, as air quality reporting requirements provided a 'way in' for outreach staff. Employers with more than 250 employees (100 employees in Ventura County) are required to report annually on employee travel behavior, and outreach staff can both conduct this analysis and generate

RideGuides at the same time. The balance has changed, however, with the establishment of the 'Rideshare Rewards' program in Los Angeles County, which targets smaller employers. Account executives' time is now split approximately 50:50 between smaller worksites and the regulated employers.

Other markets

SCR has focused on its core employer market, rather than attempting to reach out to new markets. Universities, for example, are treated like large employers, with efforts focusing on staff commuting rather than students. The School Pool program, which tries to 'carpool' parents who drive their children to school, was tried with varying degrees of success, depending on the commitment of the school and local parking and congestion. This program was dropped by the Regional Rideshare Program's funders.

South Florida Commuter Services

The South Florida program is focused on large employers. Its largest client (Miami-Dade County Schools) has 50,000 employees, and it has more than 15 clients with 1,000 employees or more. South Florida has developed this focus given the high cost of mass marketing, and the fact that employer-based efforts tend to be more self-sustaining.

Small companies are not refused service; rather, the aim is to target large firms. In addition, the focus on employers is not an exclusive one, and some limited general public marketing has been conducted in niche markets. For example, the Emergency Ride Home program was advertised on Spanish-language TV networks.

Commuter Services sometimes uses mass-marketing media to reach businesses. One advertising campaign on the tax benefits of commuter assistance programs (scheduled to be repeated due to its success) used media such as the South Florida Business Journal and PBS to reach a business audience. Around 50-75 businesses called the 800 number, including senior managers from large corporations as well as small firms.

Commuter Connections (DC)

The DC area program is geared towards large employers with 100 or more employees per site. About 20 sales representatives conduct the employer outreach in the DC MPO area; these are employed or contracted by local jurisdictions, using money (about \$800,000 a year) passed through to them by the regional program.

Commuter Connections' Commuter Operations Center, which performs the actual ridematching, has 28 client members. As well as the 10 jurisdictions that use regional funding to conduct the employer outreach, client members include cities and counties in the Baltimore and Fredericksburg MPO areas, together with TMAs and some large employers such as the Pentagon. Client members pay a fee to Commuter Connections to provide ridematching services, marketing and technical assistance and training. Some client

members print out their own matchlists and mail them to individuals, while others rely on Commuter Connections for these services.

Around 80-85% of applications sent directly to Commuter Connections (rather than local staff) are received via the web. These are generated from a variety of sources: employer outreach, transportation fairs, general marketing, federal government department transportation coordinators, and calls to the program's 800 number who ask specifically for the website address.

MetroPool (Stamford)

To a greater extent than the other rideshare programs considered here, MetroPool targets both employers and the general public, with resources split roughly equally between the two. While it believes that employer outreach is cheaper and more effective in specifically reaching commuters, it considers the two aspects of the organization's work complementary. For example, general public marketing helps to build awareness in advance of site visits to an employer, and also generates calls from employers seeking assistance – particularly in implementing tax-free commute benefit programs. In addition, much of the transit-specific marketing managed by MetroPool, such as the promotion of new bus routes, is by definition targeted at a wide, general audience.

MetroPool targets small employers as well as large corporations. However, this is largely a function of the long history of the program; most large employers have already been contacted, and work here consists largely of ongoing support. In addition, the organization tries to enlist corporate developers responsible for new office parks and other clusters of small businesses.

The most recent marketing plan identifies three specific markets, in priority order:

- **Commuters** who work at locations within the MetroPool service area. Ideal characteristics include a one-way commute of at least ten miles; primarily full time workers; age 21 – 54; income up to \$100,000 per year.
- **Employers** with 50+ employees, in locations within MetroPool service area
- **Other travelers:** shoppers, university students

6. Evaluation

Figure 2-4 presents a range of performance measures used by each program. The table is not intended to be fully comprehensive, but rather give an indication of the number of targets set and the areas in which performance is monitored. MetroPool, for example, has one or more detailed targets for each subtask in its work program. In addition, the nature of the target may vary between organizations; for example, an ‘employers contacted’ target may cover site visits or just a telephone call, and may include follow-up visits as well as new employers recruited to the program.

Details of RIDES’ targets are provided for ease of comparison with peer agencies, and Chapter 3 provides a more comprehensive overview of RIDES’ evaluation measurements and targets. A complete list of targets is given in Appendix A. However, many more program areas may be monitored or measured, without the setting of associated targets. In addition, some targets are mandated by program funders, while others are set ‘in house’, primarily as a management tool.

Several indicators are tracked by all the agencies considered, even if they are not the subject of a specific target:

- **Air quality improvement.** All the agencies calculate the impact of their program on air quality, in terms of the amount of pollutants saved. Commuter Connections has a specific target for air quality improvement from ridesharing, derived from the region’s Transportation Improvement Program to help achieve air quality conformity.
- **Size of ridematch database and inbound calls.** All agencies monitor these two indicators, and all except Commuter Connections have a specific target for database size and number of inbound calls.
- **Employers contacted.** Every agency considered has a specific target for the number of employers contacted. In some cases, this is separated into new and follow-up contacts. In the case of Commuter Connections, which operates a decentralized employer outreach program through local jurisdictions, the targets are set out in the scope of work as a condition of passing through funds. A related indicator is used by Commuter Connections and MetroPool, which sets targets for the number of employers moving to a more robust level of TDM program.

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Figure 2-4 Rideshare Program Performance Measures and Targets

	RIDES for Bay Area Commuters	Southern California Rideshare	South Florida Commuter Services	Commuter Connections (DC)	MetroPool (Stamford)
Air quality improvement	○	○	○	●	○
VMT reduction	●	○	○	●	
Vehicle trip reduction	●	○	○	●	
Mode switch		(1)	○		
Carpool mode share		(1)			
Commuter cost savings			○	○	
Parking spots saved			○		
Gasoline saved			○	○	
Size of ridematch database	●	●	●	○	●
Matchlists/month	●	●		○	● (2)
Average names/matchlist	●				
Turnaround time for matchlists		●			
Placement rate	○	○	○	○	
Longevity of carpools			○		
Carpool mode split among database members			○		
Inbound calls	●	●	●	○	●
Outbound calls	●	●			●
Website hits	○	●		○	●
Number of vanpools	●	●	○		●
Employers contacted	●	●	●	●	●
Level of employer TDM programs (3)				●	●
Targets for specific events (e.g. Rideshare Week, Bike To Work Day)	●			●	●
Names in other databases (e.g. Carpool to Rail, Tax Benefit Program)	●		●		
Media coverage	○		○	○	●
General public awareness of regional rideshare services	○ (4)	○	○		●
Satisfaction with rideshare services (database members)	○		○		

Key:

● = Specific target ○ = Monitored or measured, but no specific target

(1) Targets for carpool mode share are defined in the Regional Transportation Plan, but not SCR's work program

(2) Target is for rideshare/transit referrals

(3) Commuter Connections and MetroPool have four specified 'levels' of employer TDM efforts, corresponding to the robustness of the program

(4) Name recognition of RIDES

Figure 2-5 Deliverables Produced

	RIDES for Bay Area Commuters	Southern California Rideshare	South Florida Commuter Services	Commuter Connections (DC)	MetroPool (Stamford)
Annual Report	•		•	•	•
Quarterly Reports	•		•		•
Monthly Reports	•	•	•	•	•
Placement study	•	•	• (1)	•	•
Database monitoring study	•		• (1)		•
Program report card	•				•
TFCA/TERM reports	•			•	
Workscope task reviews	•		•		•
Employer satisfaction survey		•		•	•
Commute Profile-type survey	•	•		•	•
Press clippings book/log	•		•	•	•

(1) Conducted by the Center for Urban Transportation Research at the University of South Florida.

Southern California Rideshare

This program uses a two-pronged evaluation strategy:

- **Top down**, through the State of the Commute survey (similar to RIDES' Commute Profile) every two years, which helps track trends and public awareness. It helps indicate how much ridesharing is due to SCR's activities, and how much due to employer activities and 'natural' carpool formation. Census data and SCAG's origin-destination surveys also help with this top-down analysis.
- **Bottom up**, through placement evaluations, using the methodology established in 1995 by the Survey Research Center at Chico State University¹. This is primary way in which the program tracks its effectiveness. While the most recent placement study was conducted in 1995, a new one is scheduled for this year.

SCR also conducts an Employee Transportation Coordinator effectiveness survey, to evaluate the quality of its employer outreach. This is a 14 page written survey sent to all employer clients; a 25-30% response rate is typical.

Together with the specific goals tracked monthly for the program's funders (listed in the table above), SCR considers that these evaluation strategies give a comprehensive indication of performance. However, it suggests that it may not have done the best job in

¹ King, Michael and Alderson, Barbara (1995), "Rideshare Placement Measurement: A Proposed Standard Methodology," Survey Research Center, California State University, Chico.

disseminating the performance measures in a language that elected officials can readily comprehend. In particular, VMT reductions, cost per trip reduced and air quality benefits may speak loudest to policy makers. SCR notes that rideshare programs almost always fall under incredibly tight scrutiny. The evaluation for a \$1-2 million rideshare program is far more intense than for a highway project costing many hundreds of times more.

Southern California Rideshare has also been the subject of two consultant-led performance evaluations this year, as part of a wider review of rideshare service provision in the region. These consisted of:

- A Regional Core Rideshare Service Study, examining various models of service delivery²
- A Rideshare Evaluation for the Los Angeles County Metropolitan Transportation Authority³. This focused specifically on the effectiveness and cost-effectiveness of MTA-funded rideshare program activities, including SCR's Core Rideshare Services, Rideshare Rewards, and the Vanpool Rebate Program. The cost-effectiveness (for each placement and per trip/VMT/lb. of pollutant reduced) was also compared to other programs across the country.

The 2001 Regional Transportation Plan sets out specific expectations for ridesharing's contribution to regional congestion and air quality goals. It calls to maintain the existing carpool mode share of 15% over the next 25 years. Given the expected growth in travel in the region, this translates to an additional 8,000 carpools per year, and an additional 3,000 vanpools over the period – over and above the number needed to replace existing pools that dissolve. However, neither the RTP nor SCR's work program link these RTP goals with the contribution needed from organized, formal rideshare programs, or state what proportion can be expected by 'natural' carpool formation.

South Florida Commuter Services

The University of South Florida's Center for Urban Transportation Research (CUTR) takes a lead role in the long-term evaluation of the region's rideshare program, under contract directly to the Florida Department of Transportation (FDOT). CUTR produces an annual report, based on two surveys: one of people in the ridematch database, and a second general public survey. While the most recent CUTR report⁴ sets out a broad array of performance measures, it does not include associated targets – although it outlines a process by which targets might be set.

Nine performance measures monitored by CUTR are required by FDOT; however, FDOT does not specify targets. These measures are as follows:

² Moore Iacofano Goltsman, Inc. et. al. (2002), "Regional Core Rideshare Services Study. Final Report".

³ LDA Consulting (2002), Rideshare Evaluation Project. Report for LA County Metropolitan Transportation Authority.

⁴ Center for Urban Transportation Research (2002), "Performance Measures Report for South Florida and Bay Area Commuter Services". Available at www.cutr.eng.usf.edu/tdm/performanceasures.pdf.

- Commuters requesting assistance
- Commuters switching modes
- Vans in service (where applicable)
- Vehicle trips eliminated
- Vehicle miles eliminated
- Employer contacts
- Parking spots saved
- Commuter costs saved
- Major accomplishments

Commuter Services also produces some performance statistics itself – often on a quarterly basis – and there are some specific targets set as part of Commuter Services scope of work. These are set as “reasonable goals” given staffing and budget levels and assumptions such as the number of new database entries each staff member can generate, not as what is “needed” in terms of congestion reduction.

Program staff considers that CUTR’s evaluation focuses too narrowly on people in the database. They consider they get credit for their ridematch database, but none of their other activities, e.g., in prompting people to take transit or carpool, even if they do not find a match through Commuter Services.

Commuter Services staff would also like to see targets tied more closely to workplan objectives. They should focus on both high-level objectives (e.g. reductions in VMT), and specific measures such as database size. These low-level measures are important as they indicate the specific results of program activities, and are also needed to calculate figures for VMT reduction and other high-level targets.

The effectiveness of employer outreach is not assessed formally, although occasional case studies are documented as part of follow up with a specific employer. A focus group with the largest employers is planned for the Fall.

Program staff admits that there is a credibility problem in terms of FDOT accepting the figures for trip and emissions reductions. They believe that FDOT sees a mismatch between improving rideshare evaluation reports on one hand and empty HOV lanes and worsening congestion on the other.

One of the objectives in Commuter Services’ 2002 work program is to develop a more effective method of tracking and evaluating its work. As the work program states, there is a consensus that the formulas used by CUTR to determine trips reduced, commuter costs saved and so on may be unrealistic and need to be revisited.

Commuter Connections (DC)

Emissions reduction is the driving force behind the program in the DC region. Evaluation is conducted largely in terms of the air quality benefits, and ridesharing's effectiveness as a formal Transportation Emissions Reduction Measure (TERM).

Evaluation techniques include:

- The planned State of the Commute survey, covering 72,000 households at a cost of \$300,000. This will be used to assess the rideshare program's success in forming carpools, and other TERMS such as the Guaranteed Ride Home program.
- Regular placement rate studies, using the Chico State methodology. A 43% rate is currently being achieved.
- An annual employer satisfaction survey, measuring the employer's knowledge of the services available, and their usefulness and degree of satisfaction.
- Data from sales representatives and the EPA's Commuter Choice model to evaluate the effectiveness of employer outreach.
- The Transportation Emissions Reduction Measures report.

The TERMS assessment is the centerpiece of the evaluation program. Goals are set by the Council of Governments Board, which determines the target contribution of each individual TERM – such as ridesharing – to meeting the emissions reduction budget.

The program only has specific targets for TERMS. According to Commuter Connections staff, the funders are not interested in details such as database size and placement rates, as long as the program is perceived to be doing a good job and meeting its TERM targets. The quality of all the efforts of the rideshare program, for example in training sales representatives, should ultimately be reflected in these emissions reduction figures.

However, there are specific goals for local jurisdictions concerning employer outreach. These are calculated by the regional goal needed to meet emissions targets, divided by the local employment base. There are also goals for specific events, such as 1000 participants in Bike to Work day.

No specific deliverables are required by funding agencies. However, a range of reports (noted in the table above) are produced voluntarily by Commuter Connections.

MetroPool (Stamford)

Objectives and targets, together with the whole Strategic Plan, are largely set on the initiative of MetroPool itself; they are generally not required by funders. The relationship between MetroPool and the state DOTs is more a partnership than a vendor-client one, and while the DOTs are interested in performance, the program is not asked to provide a wide range of evaluation statistics to them.

At least one concrete target is set for every single subtask. In most cases, these are quantitative. For example, annual targets related to employer on-site services include:

- Maintain employee commute programs at 124 sites
- Establish new programs at 25 employer sites
- Recruit an average of five new participants per site
- Conduct 30 customized on-site Transportation Events
- Place 25 new Commuter Information Kiosks at employer sites
- Provide new materials (flyers, brochures) for the kiosks once per month
- Place MetroPool-provided web content on ten employer intranet sites

The performance of various outreach and marketing strategies are also monitored through follow-up surveys, such as the number of new train or bus riders resulting from a direct mail campaign. Individual goals are also set for each staff person.

Targets are generally set in line with what is 'achievable', based on assumptions of staffing and funding, rather than 'what is necessary' to achieve congestion or air quality goals. However, some counties in the area do have their own mode split targets. These filter down to MetroPool, largely in terms of the effort made in that specific geographic area; in other words, MetroPool does take on some responsibility in helping to achieve these targets. State and local targets are specifically referenced in the work program; for example one task is to "work in partnership with the Vanpool Office to achieve state vanpool goals for southwestern Connecticut".

7. Database Quality

Figure 2-6 Database Purge Times

	Aims to purge data every...
RIDES for Bay Area Commuters	5 months
Southern California Rideshare	12 months
South Florida Commuter Services	6-12 months
Commuter Connections (DC)	6 months
MetroPool (Stamford)	12 months

Southern California Rideshare

While SCR's database is the largest in the nation, its size is inflated by "survey only" entries, which are used to calculate Average Vehicle Ridership even though the respondent specifically indicates that they are not interested in ridematching. However, SCR has a clear justification for entering these into the ridematch database, and retaining data that are not required for carpool matching:

- They would have to be entered anyway, to calculate AVR
- They can be used to produce home-origin density maps for employers. The employer might then take the initiative and suggest that carpooling might be a good option for that employee.
- The data are useful for employers in the wake of an earthquake or other disaster, to facilitate emergency transportation

Typically, data are purged once a year in conjunction with the annual visit to the employer. It is quicker for staff to purge all entries from an employer and reenter them, rather than work out which need to be updated.

The goal is to purge other names in the database after one year, following a phone call to see if the person is still interested in ridematching. Approximately 15,000 of these outbound calls are made per year. No names more than 18 months old are included in the database.

South Florida Commuter Services

The South Florida database has not been cleansed since the new contractor took over in September 2001. In the past, it was cleansed four times a year; the aim is now to do this once or twice a year, due to the high cost (estimated at \$20,000) of follow-up calls.

Commuter Connections (DC)

The default ‘purge time’ for an entry to be followed up or deleted is six months. Purges are conducted monthly, with notification letters sent to commuters whose records will expire within the next month.

Client members of the Commuter Operations Center (cities and counties and some TMAs and large employers) are allowed to specify how often they want their records purged. While some prefer a longer time between purges for their data, other client members press for more frequent purges to increase the quality of the information. This ‘peer pressure’ is cited by program staff as a way to maintain quality while retaining purge flexibility for member clients.

MetroPool (Stamford)

With 2,300 names, MetroPool’s ridematch database is far smaller than the other rideshare programs here. The reason for this is unclear; possible explanations cited by agency staff include:

- A low propensity to carpool, due to a relative abundance of transit options, a high-income commuter base, and the large number of people with flexible working hours
- The fact that MetroPool is far less ‘ridematch centered’ than some other rideshare agencies
- All individuals in the database have individually opted in; the program does not receive bulk data from employers as does Southern California Rideshare, for example

The standard mechanism to maintain database quality is a letter after 12 months, asking people if they are still interested in carpooling. The aim is for data to be a maximum of 18 months old.

8. Impact of real-time online ridematching

South Florida Commuter Services

South Florida is interested in acquiring online ridematching software, and at the very least to upgrade their software to accept ridematch requests via the web. This would allow heavier marketing of the website, and facilitate employer outreach through having a mobile kiosk on-site.

Commuter Connections (DC)

Commuter Connections is acquiring new “E-communicator” software to automate additions to the ridematch and Guaranteed Ride Home databases for applications received via the web. (At present, data from the web are still entered manually.) This is estimated to free a

major amount of staff time from data entry to focus on follow up – estimated at around 35-40 people, although these people have other responsibilities besides data entry.

Commuter Connections has decided not to implement real-time online ridematching at present, largely due to the security concerns given the large number of federal employees in the database. However, there will be few differences between its new system and real-time ridematching in practice, apart from a slight response delay (less than 24 hours) to review the information submitted and batch process it through the ridematch system. The delay will also allow Commuter Connections to notify the client member – for example the local jurisdiction – so that its staff can make a personal follow-up call or e-mail, providing customized transit, park-and-ride and other local information.

MetroPool (Stamford)

MetroPool currently uses Geomatch off-the-shelf ridematch software. However, it is looking to purchase a new package that provides real-time ridematching and customized transit itineraries. E-commuter is one package under consideration. The ambition is also to upgrade the website to make it truly inviting and interactive, and help to build online communities – for example through the use of bulletin boards to allow commuters to talk directly to each other. This is expected to lead to a dramatic increase in database size, and a goal of 10,000 names has been set for next year, up from the current 2,300.

King County

In March 2001, King County implemented the E-commuter online ridematching software that RIDES is purchasing. Its experience is as follows:

- Four staff members continue to work on ridematching – the same number as before. They are now able to attend more transportation events, and it is easier to accommodate assistance for special projects.
- Fewer update mailings to people in the database are needed, as e-mails requesting information updates are sent via the online system. However, a monthly update mailing still needs to be processed for those without e-mail addresses.
- Calls have gone down by around 18% since the introduction of RideshareOnline (RSO) last year.
- RSO generates a number of e-mails (150-250 per month) that need response, through the “Contact Us” button on web pages. Each usually requires some investigation, and staff has to be very familiar with RSO in order to respond to questions and problems. Ongoing data clean up and review is also required. In other words, the system is not “completely automated.”

9. Relationships with other agencies

None of the agencies considered report any conflicts with TMAs, local jurisdictions or other rideshare service providers. This is largely due to the weakness of TMAs, and agreements that the regional agency will avoid their geographic area unless specifically invited.

In addition, the institutional framework in which several of the agencies operate minimizes the potential for overlap with county-operated programs. Commuter Connections passes funding for employer outreach through to local jurisdictions. In Southern California, counties can elect to have the regional rideshare agency provide employer services (Los Angeles and Ventura), provide these services themselves or through a private contractor (Riverside and San Bernardino), or not fund employer services at all with the regional agency providing these on a fee-for-service basis (Orange).

Southern California Rideshare

Southern California Rideshare reports excellent relationships with local TMAs, and an absence of competition. This, however, is attributed to the fact that TMAs in the region have diminished in number, and many of the remaining organizations are struggling.

SCR does not operate in the specific geographic territory of a TMA, unless asked. Some TMAs use SCR for ridematching and RideGuide production; others, particularly with high-security companies like Boeing, prefer to have exclusive matching within that TMA. According to SCR staff, the TMAs see the regional program as complementing their own efforts through helping to raise awareness of ridesharing.

South Florida Commuter Services

There is little overlap with the three TMAs in the South Florida area, as these organizations focus on promoting their shuttles. They tend to refer carpooling enquiries to South Florida Commuter Services.

Commuter Connections (DC)

Commuter Connections aims to support the local programs of client members such as TMAs, through providing ridematching and other centralized services. Since it provides central services to local jurisdictions, large employers and TMAs, overlap is avoided.

MetroPool (Stamford)

With the demise of the three TMAs in its region, there is no 'competition' for MetroPool's services. While some counties employ their own staff to provide employer services, these programs are run in partnership with MetroPool. There is not considered to be any overlap or duplication.

Chapter 3. Performance Monitoring and Reporting

1. Introduction

The Regional Rideshare Program work plan contains a quality control and monitoring element. This element includes a quarterly survey of the clients in the rideshare database, a semi-annual database monitoring study, a monthly report card, a monthly narrative progress report on the status of implementing work plan elements, and quarterly progress reports. Beginning in Fiscal Year 2002, the element also includes an annual report.

The purpose of this review is to assess the effectiveness of these reporting methods in conveying the value of the program and in documenting work activities and performance. This chapter starts with a summary of findings and recommendations. It then provides an analysis of:

- Program Measurements and Targets
- Performance Measurement Methodology
- Reporting Strategy
- Program's Outcomes

2. Summary of Findings & Recommendations

Findings

- RRP performance monitoring and reporting focuses on activity-based measurements to understand the effectiveness of program elements. Funding partners, however, are more interested in outcomes-based measurements. The existing activity-based measurements have not been successful at drawing conclusions about element effectiveness, and the outcomes-based measurements that are tracked by the RRP are buried within the data. As such, neither the funding partners, nor MTC get what they want out of the monitoring and evaluation component of the Regional Rideshare Program.
- The number of placements into alternative modes and the vehicle trips reduced by the program most effectively convey the program's value. RIDES collects this information, but it is not summarized or presented in a readily-accessible format.
- Many interviewed stakeholders expressed concern about the rigor of RIDES' data collection strategies. The audit found the definition and calculation of placement rate and vehicle trip reduction to be sound, logical, and appropriate for measuring

the program's ability to shift people from their SOVs and sustain that mode shift. The key weakness in the process is in presenting the results.

- Vanpool formation is being double-counted by different agencies. This, in itself, is not seen as a problem by the audit team, but the costs of vanpool formation should be better documented.
- For all the reporting that the program provides, it is not easy to discern whether program targets are being met.
- FY02 has been marked by declining ridership on transit and less vehicular traffic on the roadways given the Bay Area's sluggish economy. The same things that are affecting these travel statistics throughout the Bay Area are surely impacting the Regional Rideshare Program. This caveat aside, the program did not meet the majority of its FY02 goals.

Recommendations

The following recommendations are further refined in Chapter 9 of this report.

- Define and prioritize outcomes-based performance indicators.
- Use the large quantities of activity-based performance measurements to draw conclusions to support the continuation of program elements or change the program direction.
- Develop measurements for customer satisfaction and the quality or accuracy of the information in the ridematching database.
- Provide an identification number for each vanpool so that the cost of forming vanpools is accurately understood.
- Continue the process currently used to set program targets – using program achievements in past years and estimates of future accomplishments given the expected program budget and other external factors.
- Utilize trend analysis and assess outcomes in terms of cost per output (e.g. placement, vehicle trip reduced) to convey the program's value.
- Structure the reporting mechanisms to achieve the following objectives:
 - Identify the purpose of each report and structure the data within the report to meet that purpose.
 - Identify the primary audience of each report and structure the report to address the informational needs of that audience.
 - Develop the reports so that, as a whole, they tell the full story of the Regional Rideshare Program.
 - Develop the reports so that, individually, they stand on their own and tell a key piece of the Regional Rideshare Program story.

- Develop a high-level summary report so that, at a glance, readers can understand the number of placements made and vehicle trips reduced.
- Summarize the program's work plan targets in one reporting document

3. Measurements and Targets

The Regional Rideshare Program's work plan is made up of distinct activities, or work plan elements, designed to achieve the following program goal.

The goal of the Regional Rideshare Program is to shift individuals from single occupant vehicles (SOVs) to carpools, vanpools and other transportation alternatives and help individuals sustain this shift.

Figure 3-1 shows the Regional Rideshare Program's measurements and targets. These measurements include those established in the contract Scope of Work, those used by RIDES for internal monitoring purposes, those estimated through the TFCA grant funding process, and those tracked and reported but for which targets have not been established. Only those identified as "scope of work" targets are considered program performance measures of the Regional Rideshare Program contract.

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Figure 3-1 Regional Rideshare Program FY02 Performance Measures

	Annual Target	Measures...	Authority ¹
MATCHLIST TARGETS			
New Matchlists generated	21,600	Matching activity	Scope of Work
Matchlist Updates generated	15,000	Matching activity	Scope of Work
Placement phone calls	15,000	Matching activity	Scope of Work
Number of active ² people in the ridematching database	16,000	Ability to Match / Public awareness of program	Scope of Work
Matchlists with 5 or > names	65%	Ability to Match	Internal
Matchlists with 3 or > names	80%	Ability to Match	Internal
Matchlists with 1 or > names	95%	Ability to Match	Internal
Matchlists requested by source (e.g. website)	°	Effectiveness of Information Channels	N/A
Placement rate	°	Matching activity	N/A
Number of placements	21,315	Matching activity	Internal
Names in Carpool to BART database	2,500	Ability to Match / Public awareness of program	Scope of Work
EVENT TARGETS			
Staffed Events	180	Marketing effort/Level of employer contact	Internal
Matchlist requests from events	4,500	Effectiveness of events	Internal
Rideshare Week Participation Pledges	10,000	Effectiveness of events	Scope of Work
Vanpool driver leads generated from Annual Vanpool promotion	500	Effectiveness of events	Scope of Work
Bike to Work Day pledges	9,000	Effectiveness of events	Scope of Work
Bike to Work Day energizer stations organized	125	Quality of events	Scope of Work
MARKETING TARGETS			
New materials produced each month	°	Level of marketing activity	N/A
Commute Literature Distributed	9,000	Public awareness	Internal
Website hits	°	Public awareness	N/A
Media coverage	°	Public awareness	N/A
Name recognition of RIDES/Regional Rideshare Program	°	Public awareness	N/A
VANPOOL TARGETS			
Vanpools formed	96	Vanpool activity	Scope of Work
Vanpool fleet size	825	Vanpool activity	Internal
Vanpool formation meetings	°	Vanpool activity	N/A
EMPLOYER OUTREACH TARGETS			
Active ³ employers in database	5,000	Level of employer outreach	Scope of Work

¹ Authority means how or by which agency the target is set. For example, some targets are objectives within the Scope of Work, while others are set by RIDES for internal performance evaluation.

² Active means individuals who have confirmed interest in ridematch services within the last five months.

³ Active means the employer receives regular communication from the rideshare program (mail, e-mail, telephone), their contact information is current and they do not request to be inactivated, either on their own accord or through the yearly update mailing.

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	Annual Target	Measures...	Authority ¹
Employers enrolling in a Commuter Benefit program after receiving consultation	240	Employer outreach impact	Scope of Work
Employer consultations per year	100	Level of employer outreach	Internal
New Active Employers	200	Level of employer outreach	Internal
TRANSIT TARGETS			
Number of transit information requests ⁴ processed	4,800	Transit activity	Scope of Work
CUSTOMER SATISFACTION			
Satisfaction with RIDES' services	°	Customer satisfaction	N/A
EXTERNAL IMPACT TARGETS			
Air quality improvement	°	Impact on Air Quality	N/A
VMT reduction goal Federal FY02 ⁵	79,899,090 ⁶	Impact on Mobility	TFCA Funding
One-way vehicle trips reduced	1,220,639 ⁷	Impact on SOV	TFCA Funding

° = Monitored or measured, but no specific target

The Regional Rideshare Program targets that are established by the program's Scope of Work are set through a collaborative process between RIDES and the Metropolitan Transportation Commission. RIDES assesses its achievements in past years and determines what it believes it can accomplish in the upcoming fiscal year given the expected program budget. Most of the agencies included in the peer review set their performance targets on a similar basis. Compared to these peers, the Bay Area program has more targets and tracks more activities.

TFCA funding targets represent the vehicle trip reduction and vehicle-miles-traveled reduction that the program estimates it will achieve in the coming year. These estimates are calculated as part of the TFCA funding process.

Issues Related to Establishing Measurements & Targets

This section looks at the challenges inherent in measuring the performance of a rideshare program.

⁴ Transit information requests include providing transit trip itineraries to individuals, using transitinfo.org to provide trip information over the phone or mailing general information about how to take transit.

⁵ This target is based on the federal fiscal year, October 1 thru September 30.

⁶ This "target" is the annual VMT reduction that the program is estimated to produce. This estimate is developed as part of the TFCA funding application. The target is the **net** annual VMT reduction after deducting VMT for the HOV vehicle still on the road plus VMT by people driving to meet their pools.

⁷ This "target" is the annual one-way vehicle trip reduction that the program is estimated to produce. This estimate is developed as part of the TFCA funding application. The target is the **net** annual trip reduction after deducting the HOV vehicles that remain on the road and the vehicle trips made by people driving to meet their pools.

Activity-Based Measures vs. Outcomes-Based Measures

Measurements can serve the following different purposes:

- To understand the relationships between program activities and program outcomes;
- To understand the results of the discrete program activities;
- To satisfy reporting requirements of the program contract; and
- To articulate the value the program adds to the region.

The first two purposes are activity-based, while the last two are outcomes-based. Activity-based measures are those over which the program has more direct control, such as the number of employer site visits conducted. Outcomes-based measures assess the sum output of the efforts, such as total vehicle trips reduced.

Figure 3-2 shows the relationship between these activity-based and outcomes-based performance indicators. The figure is presented as a pyramid because the outcomes of activities on the lower tiers support the outcomes on the upper tiers. At the top of the pyramid is “placements.” Placements represent mode shift and maintenance of that mode shift, which is the goal of the Regional Rideshare Program.

Figure 3-2 Activity- and Outcomes-Based Measurements

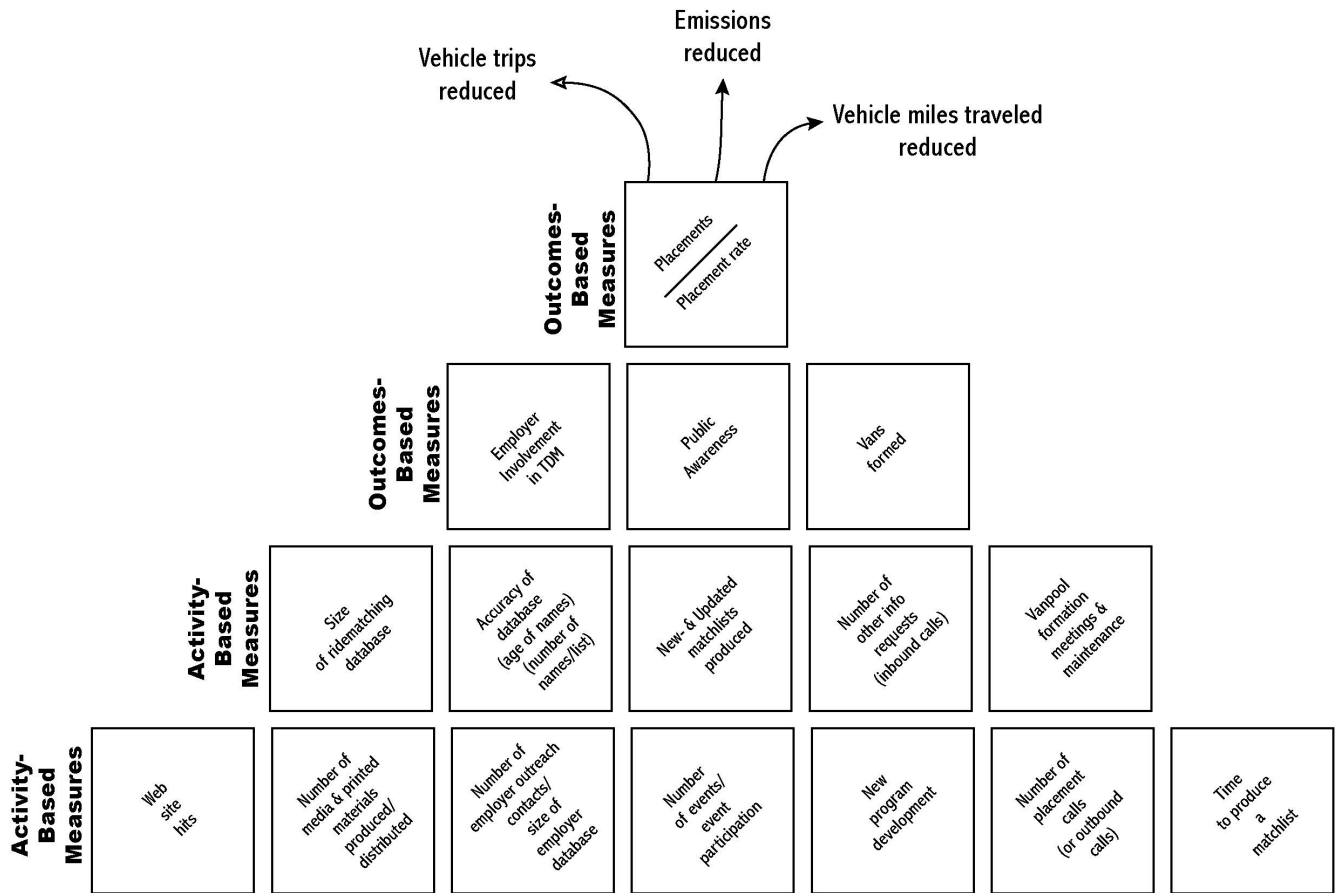


Figure 3-2 shows that by determining the number of placements achieved by the Regional Rideshare Program, and gathering additional data about the nature of those placements, several further outcomes can be quantified, such as reduction in vehicle miles traveled and reduction in vehicle trips.

Outcomes-based measures are of most interest to the funding partners, and funding partners generally agree that the number of people placed into alternative modes is the most important measure. To date, the contract has focused on tracking activity-based measures, as MTC has found them to be the most suitable proxy for understanding outcomes. The activity-based targets established in the RRP contract, however, do not explain to the funding partners what they want to know. They also do not provide much insight toward understanding program element effectiveness. There are several reasons for this:

- **Not all program elements can be linked to effectiveness.** For example, employer events may influence carpool formation among co-workers, but the Regional Rideshare Program may never know about these carpools if the employees did not need matchlists to form the pools.

- **Interpreting the data to draw conclusions is challenging.** Effectiveness, ultimately, is the number of vehicle trip reduced or the number of “placements.” To draw a causal relationship between each program element and placements is often extremely difficult or very costly. RIDES collects a great deal of data to explore program effectiveness, but has been able to draw few conclusions.
- **The effectiveness of different program elements is not necessarily comparable.** It is difficult to compare the effectiveness of monitoring the transit information posted in BART stations with the effectiveness of helping an employer conduct an employee survey.
- **The whole is greater than the sum of its parts.** All the program elements work together in some way to produce placements. While it is important to weed out activities that do little good, too much focus on determining the effectiveness of individual elements can weaken the overall evaluation effort.

Prioritizing Measurements

To support MTC’s goal of determining the effectiveness of program elements, the evaluation should prioritize those activity-based measures that will address MTC’s effectiveness questions, and link specific measures to answering specific effectiveness questions.

While all the performance measurements tracked by RIDES are useful, prioritizing those that convey the program’s value over those that track activities would focus the evaluation reports and provide the funding partners with more useful information. As stated by one of the stakeholders interviewed for this performance audit, “RIDES collects tons of data and we see tons of data, yet we don’t understand if the program is doing anything.”

Lack of Benchmarks

Unlike other transportation fields, there are no industry standards for rideshare programs performance standards. For example, transit performance is based on measurements like cost per passenger and passengers per vehicle service hour. While the measures shown in Figure 3-2 are commonly tracked by rideshare agencies throughout the country, there are no benchmarks by which agency performance can be compared.

Similarly, comparing the performance of ridesharing agencies to each other is also problematic. Regional transportation resources, such HOV and transit networks, and rideshare program funding levels create regional differences that limit a comparison’s ability to indicate the relative performance of agencies. Furthermore, agencies do not all measure their outcomes by the same standards. No agency, including RIDES, interviewed as part of this audit uses peer data to benchmark its performance. A review of the peer agency targets is included in Appendix A, but this audit does not recommend using peer comparisons to measure performance.

Trend analysis may be helpful in analyzing the reasons for program outcomes. Despite the influence of external factors, trend analysis allows an evaluator to look for increases or decreases in performance that can only be explained by actions of the agency. Trend analysis is also helpful in setting future targets, because it allows the agency to see what can be accomplished given static funding. Trend analysis can allow an agency to see what kind of growth can be reasonably expected given the maintenance of quality service. RIDES analyzes several trends, including database size by month and placement rate by quarter or trimester. None of the peers interviewed as part of this audit uses trend analysis in its performance evaluation.

Showing outputs in terms of their cost should also be explored for inclusion in the RRP's performance reporting. The ability to show data in terms of cost per commuter served or cost per placement has the following advantages:

- Presenting results in terms of cost-per-unit can effectively confirm or dispel the conviction that funding is increasing while results are declining; a perception held by some of the funding partners interviewed as part of this audit;
- High-level stakeholders such as elected officials are used to seeing cost-per-unit data;
- Cost-per-unit data could be a powerful tool to convey program value;⁸ and
- Cost per vehicle trip reduced is a measurement often used to look at the effectiveness of transportation demand management programs.

The disadvantage of such a cost-per-unit calculation is that the trip reduction impact of many of the program's activities cannot be tracked. For example, employer outreach may result in new carpoolers or transit riders that are not directly counted by the Regional Rideshare Program. In addition, the program's budget is not broken out by work plan element. Thus, any cost per unit calculation must be a generalization of total budget year-to-date divided by the tracked units year-to-date. Since all program activities support placement and vehicle trip reduction in some way, however, this may be a fair approach. Recommendations for using trend analysis and cost-per-output data are refined in Chapter 9 of this report.

Additional Measurements

A final issue with the measurements and targets is that stakeholder interviews identified two measurements of interest to the funding partners that are not well-tracked by the program: database accuracy and customer satisfaction.

Funding partners are concerned that the information in the ridematching database is old or inaccurate. The Bay Area's Regional Rideshare Program, however, purges its database every

⁸ For example, the FY02 estimated cost per vehicle trip reduced is ~ \$1.42. This is the total budget -- \$4,163,000 divided by 2,929,258 vehicle trips reduced (per June 2002 Rideshare Program Report Card).

five months, which is the most frequent purge cycle of the agencies interviewed as part of the peer review.

The quarterly matchlist survey asks people if they called anyone on their matchlist. One choice is “I attempted to call but the information was wrong.” In FY00-01 just 2.3% of clients in the matching database gave this as a response. Funding partners also wanted to know if employer, matchlist, and non-matchlist customers were satisfied by the service they received from RIDES. Recommendations on these issues are presented in Chapter 9.

4. Performance Measurement Methodology

The auditor looked at the methodology used by the Regional Rideshare Program to track its performance, focusing on how the rideshare program tracks vanpool formation and modal shift. Funding partner interviews revealed confusion and concern about these two aspects of the evaluation methodology. Funding partners doubt the validity of the database survey and the classification of placements. People are also concerned that the program “takes vehicle trip reduction credit” for moving people between carpools or from transit to carpool.

Figure 3-3 shows the methodology used to measure the targets that were presented in Figure 3-1.

Figure 3-3 Measurement Tools

Target ⁹	Measurement Methodology
MATCHLIST TARGETS	
New Matchlists generated	Database monitoring
Matchlist Updates generated	Database monitoring
Placement phone calls ¹⁰	Noted in database; database monitoring
Number of active ¹¹ people in the ridematching database	Database monitoring
Matchlists with 5 or > names	Recorded in database; database monitoring
Matchlists with 3 or > names	Recorded in database; database monitoring
Matchlists with 1 or > names	Recorded in database; database monitoring
Matchlists requested by source (e.g. website)	Recorded in database; database monitoring
Placement rate	Quarterly database survey
Number of placements	Extrapolated from placement rate
Names in Carpool to BART database	Database monitoring
EVENT TARGETS	
Staffed Events	Internal tracking
Matchlist requests from events	Internal tracking
Rideshare Week Pledges	Internal tracking
Vanpool driver leads generated from Annual Vanpool promotion	Internal tracking
Bike to Work Day pledges	Internal tracking
Bike to Work Day energizer stations organized	Internal tracking
MARKETING TARGETS	
New materials produced each month	Internal tracking
Commute Literature Distributed	Non-matchlist database
Website hits, user sessions, or page views	Website hit tally
Media coverage	Internal tracking
Name recognition of RIDES/Regional Rideshare Program	General public survey – Commute Profile
VANPOOL TARGETS	
Vanpools formed	Internal tracking
Vanpool fleet size	Database
Vanpool formation meetings	Internal tracking
EMPLOYER OUTREACH TARGETS	
Active ¹² employers in database	Employer database

Regional Rideshare Program Performance Audit

Final Report

METROPOLITAN TRANSPORTATION COMMISSION

Target ⁹	Measurement Methodology
Employers enrolling in a Commuter Benefit program after receiving consultation	Through Commuter Check and Wage Works
Employer consultations per year	Employer database
New active employers	Employer database
TRANSIT TARGETS	
Number of transit information requests ¹³ processed	Non-matchlist database
CUSTOMER SATISFACTION	
Satisfaction with RIDES' services	General public survey -- Commute Profile
EXTERNAL IMPACT TARGETS	
Air quality improvement	Derived from calculated VMT reduction
VMT reduction	Derived from database survey
Vehicle trip reduction	Derived from database survey

Modal Shift (Placements)

Shifting individuals to alternative modes and helping people sustain the shift is defined as "placement."

Placement Rate

The Regional Rideshare Program defines a "placement" using the methodology developed by the Survey Research Center at Chico State University. A placement is "any change to a non-SOV commute mode within a specified period after service contact with the rideshare program."¹⁴ Three types of travel-mode change make up what is considered to be "change to a non-SOV mode." These are:

- Trial placements in which the commuter tried a non-SOV mode following service contact with the rideshare program, but is no longer in the non-SOV mode at the time the monitoring survey is conducted. A trial placement may be as brief as one day and includes people who try an alternative mode as part of a regional promotion, such as Rideshare Week or Bike to Work Day.

⁹ Not all of these tracked measures have targets, nor are all of them explicit objectives of RIDES or the Regional Rideshare Program. See Figure 3-1 for details about which are established objectives with targets.

¹⁰ RIDES staff makes "placement phone calls" to people in the database to pro-actively facilitate ridematching among clients.

¹¹ Active means individuals who have confirmed interest in ridematch services within the last five months.

¹² Active means the employer receives regular communication from the rideshare program (mail, e-mail, telephone), their contact information is current and they do not request to be inactivated, either on their own accord or through the yearly update mailing.

¹³ Transit information requests include providing transit trip itineraries to individuals, using transitinfo.org to provide trip information over the phone or mailing general information about how to take transit.

¹⁴ King, Michael & Barbara Alderson, "Rideshare Placement Measurement: A Proposed Standard Methodology," Survey Research Center, California State University, Chico. June, 1995, page 3.

- On-going placements in which the commuter changed from driving alone to a non-SOV mode following service contact with the rideshare program and is still in the non-SOV mode at the time the monitoring survey is conducted.
- Maintenance placements in which the commuter changes carpool partners, changes from one non-SOV mode to another, or adds members to the carpool/vanpool.

The placement rate, then, is the sum of:

- % of people making a temporary change from SOV to any HOV Mode (trial placement) +
- % of people making a long-term change from SOV to any HOV Mode (on-going placement) +
- % of people making changes between HOV Modes (maintenance placement) +
- % of people adding or changing riders in their existing pool (maintenance placement) +
- % of people changing from one carpool or vanpool to another (maintenance placement)

The three types of maintenance placements are counted toward the placement rate, following the Chico State guidance. It is recognized that many rideshare programs “have an explicit goal of providing ongoing service to people who often change their commuting arrangements.”¹⁵ This allows a person to maintain their non-SOV travel behavior.

One of the challenges in conveying placement rate is that it is a (necessarily) complicated measurement. To explain its components each time it is presented in a summary report is cumbersome. To not explain it, leaves people unsure of what is being measured. This is discussed in more detail in the subsequent section on conveying measurements.

Database Survey

To determine the placement rate, the Regional Rideshare Program conducts two surveys each quarter. One survey, the “matchlist survey,” is administered to a sample of people in the ridematching database who requested a matchlist, received an updated matchlist, or received a placement phone call in the course of the previous quarter.¹⁶ Rideshare Week pledges would become part of the matchlist client group surveyed. The second survey (the “nonmatchlist survey”) is administered to a sample of people who contacted the rideshare

¹⁵ Ibid, page 2.

¹⁶ A placement phone call is a call from a RIDES staff person to someone in the database to follow up on whether or not the person was able to find a match. Placement phone calls are often made to someone already in the database when a new database entrant matches the commute needs of the first person. Because the new entrant would not have appeared on the first person’s matchlist, RIDES’ staff will often call the person who was first in the database to inform them of the new potential match.

program for other information, such as a transit trip plan or information from the “getting started” series.

The sample for each survey is drawn from the names of people who requested service in the previous quarter. Typically, the RRP draws a sample that will allow them to obtain 378 completed matchlist surveys and 100 completed non-matchlist surveys each quarter. This strategy allows the program to obtain a placement rate among matchlist clients that is statistically significant at the 95% confidence level with +/- 5% margin of error on a quarterly basis. The survey has the same level of significance for non-matchlist clients on an annual basis.

FY 2002 marks a departure from this sampling plan, however. In FY02, 100 matchlist client surveys and 100 non-matchlist client surveys are completed each quarter to achieve a statistically significant *annual* placement rate for each group.

Number of Placements

The number of placements among those in the matchlist group is determined by multiplying the placement rate by the number of people requesting matchlists, receiving matchlist updates, or receiving a placement phone call in the quarter. People who receive service twice (e.g. a matchlist and a placement call) in one quarter are not double-counted in the placement calculation.

The number of placements among those in the non-matchlist group is the placement rate generated from the non-matchlist survey multiplied by the number of people in the non-matchlist database who have received service in the previous quarter. People in the non-matchlist group include those who have called for information other than matchlists and from whom RIDES obtained contact information. From conversations with RIDES and from the performance evaluation materials, it is not clear if there are any criteria for how a person ends up in the non-matchlist database, nor it is clear exactly what services a person might receive to end up in this database.

The number of placements also includes people joining vanpools, based on the vanpool formation activity tracked each month. It furthermore includes an estimate of the number of placements resulting from Bike to Work Day registrations. These placements are estimated at 85% of the BTW Day pledges received based on past post BTWD surveys. The 85% placement rate assumes that all participants would not have ridden if it were not BTWD. Although this is not a fair assumption since regular, on-going bike commuters participate in BTWD, it is assumed that those who would have biked to work anyway are equally off-set by those who bike on BTWD but do not register.

Because it is possible that a person will request both a matchlist and transit information, the placement calculation applies an “overlap factor” of 0.68 to reduce the number of clients served in the non-matchlist database. If 1,000 commuters are provided with transit

information in the quarter, the 1,000 is multiplied by 0.68 (the matchlist overlap factor) and then that is multiplied by the non-matchlist placement rate.

What is somewhat misleading about the placement calculation is that the placement rate from the *prior* fiscal year is applied to the number of clients served each quarter. This is always the case in terms on the non-matchlist placements and is unique to matchlist placements in FY02, because the FY02 placement rate will not be statistically significant until four quarters of data have been collected. Thus, when the program reports the number of clients placed year-to-date, it represents the number served in each group multiplied by the respective placement rate from the previous year.

While there is nothing wrong with developing a statistically significant placement rate over the course of the year, instead of by quarter, the summary reports should not present the number of clients placed but should indicate this is the “estimated” number of clients placed. At year-end, the FY02 placement rate would be applied to show that year’s true placements. The actual number of clients placed using actual FY02 placement rates should be reported in the Annual Report. This issue is addressed in more detail in the following section on presentation of the monitoring results.

Also somewhat unclear in the reporting is the large percentage of placements that are temporary placements, resulting from Bike to Work Day. Including BTW day placements in the placement total is consistent with the placement methodology, and Bike to Work Day placements should certainly be counted, since so much effort goes into Bike to Work Day. These special event placements should, however, be called out from the annual placement total, since it represents such a high percentage of the total placements (48% of the estimated FY02 placements). Not knowing that so many placements are from BTW day inclines one to believe that there is a much greater amount of on-going placement activity occurring than is the case.

A final difficulty with placement reporting is that one cannot break out the placement rates being applied and the number of clients served when reading the monthly report card and monthly summary: This level of data detail is not provided in the reports.

According to the June '02 Monthly Report Card, RIDES placed an estimated 26,115 matchlist and non-matchlist clients in FY02 using the FY01 placement rates of 26.4% for matchlist clients and 27.4% for non-matchlist clients. Figure 3-4 shows the breakdown of FY02 placements.

Figure 3-4 FY02 Year End Placement Calculations

	Estimated Placements	% of Total
Matchlist Clients		
Trial Placement	1,984	7.86%
On-Going Placement	2,665	10.56%
Maintenance Placement	2,837	11.24%
<i>Subtotal Matchlist Clients</i>	<i>7,486¹⁷</i>	<i>29.66%</i>
Non-Matchlist Clients		
Trial Placement	2,186	8.66%
On-Going Placement	1,561	6.19%
Maintenance Placement	1,286	5.09%
<i>Subtotal Non-Matchlist Clients</i>	<i>5,033¹⁸</i>	<i>19.94%</i>
Riders in Vanpools	706	2.80%
Bike to Work Day	12,017	47.61%
Total	25,242¹⁹	100.00%

Vehicle Trip Reduction

Because maintenance placements may decrease, have no impact, or even increase vehicle trips (e.g. a person who switches from transit to carpooling), the “vehicle trip reduction” calculation does not take credit for all placements. In addition, because trial placements reduce VMT for a shorter duration than do on-going placements, the VMT reduction calculation incorporates data on length of placement.

Survey questions gather data on the time duration of the temporary placement, the number of days per week the alternative mode is used, and the person’s prior mode, so that trip reduction results are not exaggerated. The result of this calculation is reported in the Monthly Report Card and Monthly Summary.

Vehicle Trip Reduction from Bike to Work Day placements has been calculated based on the assumption that the large majority are one-time trial riders. FY02 is the first time that RIDES collected post-Bike to Work Day data from first time riders and veteran riders to determine the percentage by which each group increases its cycling in the long-term and by how many additional trips per week. The placement and trip reduction methodologies will be updated in the future to include this data and make it more consistent with the other calculations.

¹⁷ Estimated annual placements using FY01 placement rate of 26.4%.

¹⁸ Estimated annual placements using FY01 placement rate of 27.4%.

¹⁹ The total provided in the detailed calculations provided by RIDES does not match the number reported in the June '02 Monthly Report Card (25,242 vs. 26,115). It is unclear why there is a discrepancy.

For purposes of reporting to the Air Quality Management District, RIDES also deducts any “access mode” vehicle trips (i.e. people driving to a central location to meet their vanpool) from its net trip reduction savings, thereby not overestimating any pollution reduction. RIDES also deducts the vehicle trip of the carpool or vanpool remaining on the road.

It is recommended that RIDES report VMT and vehicle trip reductions consistently between the different reporting strategies. While the air district methodology is seen as inappropriate to some stakeholders,²⁰ it would be better to consistently report VMT and vehicle trip reductions determined according to the air district strategy. This eliminates misunderstandings about what is being included in the calculation, and the air district methodology is a strategy developed by a third-party that is used throughout the Bay Area for different evaluation purposes.

As with the placement rate calculation, the data collected on the number of days per week that a person uses their mode, the average length of trips reduced, and the before-after mode comparisons is from the prior fiscal year. The prior fiscal year’s data is applied to current database activity to determine vehicle trips reduced to date. While there is nothing wrong with the strategy, the summary report should indicate that this is how the results are compiled. The Quarterly Report generated by South Florida Commuter Services, one of the peers reviewed for this Performance Audit, uses this strategy and summarizes the information in a clear, concise format that explains these details about the data.

RIDES has collected data in a longitudinal panel study to determine how long an on-going placement maintains his/her mode shift. This data is used to develop the Vehicle Trip Reduction (VTR) calculation, but it is not clear when looking at VTR reporting how the results of the longitudinal study support the vehicle trip reduction calculation. The VTR calculation is significantly complex, with many different data elements contributing to its development. As such, additional information is needed in the reporting materials, so that its rigor and estimation methodology are understood. This is addressed in more detail in the following section on presentation of results.

Despite this confusion, RIDES’ vehicle trip reduction estimate is more rigorous than other rideshare programs looked at as part of this audit. For example, the South Florida program measures the number of vehicle trips eliminated and vehicle miles eliminated *without* respect to the placement’s prior mode.

Figure 3-5 shows the FY02 VMT and Vehicle Trip Reduction estimates reported by RIDES in the Monthly Report Card/Monthly Summary and in Air District reporting.

²⁰ See Chapter 4.

Figure 3-5 FY02 VMT and Vehicle Trip Reduction

	Internal and MTC Reporting		Air District Reporting	
	Annual Trips Reduced	Annual VMT Reduced	Annual Trips Reduced	Annual VMT Reduced
Matchlist Clients	1,628,966	55,384,830	1,111,529	53,315,085
Non-Matchlist Clients	699,619	12,992,762	508,966	12,492,804
New Vanpool Riders	171,531	8,748,099	70,172	8,241,302
Bike to Work Day	24,035	156,225	0 ²¹	156,225
Total	2,524,150 ²²	77,281,916	1,690,668	74,205,417

Vanpool Tracking

Another area of monitoring that deserves special attention is vanpool tracking, as some stakeholders have questioned how the program “takes credit” for vanpool formation.

One of the reasons for this concern over tracking is that several local entities provide additional vanpool formation support to people living or working in their jurisdictions. These programs include additional employer outreach and financial incentives. The programs are also funded with some of the same sources as the Regional Rideshare Program. As a result, program funders and local agency fund recipients have been concerned about the “double counting” of the vehicle trip reduction generated by the pools. The VTR cited by each program is critical to the ability to receive funding as these trips are converted to per unit costs.

The level of concern over double-counting, however, is unclear. According to representatives from the Regional Rideshare Program, coordination meetings on this issue have revealed that the funding agency – the BAAQMD – is not concerned enough about this issue to require more rigorous tracking. Stakeholder interviews, however, revealed that there is still concern about this issue from the BAAQMD and the local entities that supplement vanpool formation with their own programs.

There are many steps to forming a vanpool including:

- Identifying the driver,
- Working with the driver and his/her employer and the database to find possible riders,
- Providing the driver with posters, etc. to market the pool,

²¹ Not included in air district reporting.

²² This number is different than that reported in the FY02 Program Report Card. The source of this detailed data is data provided to MTC by RIDES for the purpose of reporting to the air district. The annual trips reduced reported in the June '02 Report Card is 2,929,258. The reason for the difference is not clear.

- Working with the driver to find a vehicle, and
- Bringing the driver and the possible riders together at a formation meeting.

Once the van is on the road, the Regional Rideshare Program counts it as a van it helped to form if it was involved in any of the formation steps. If a local agency also provides a financial incentive to the van or assists in the van's formation, both agencies most likely take credit for forming the same van. Forming vanpools is quite difficult, and requiring detail on the level of involvement that the agency has with each vanpool formation would be micro-management.

As the auditing consultant, Nelson\Nygaard does not see double counting as a problem, because it is probable that the van would not have gotten on the road without the joint efforts of the regional and local programs. One would also suspect that more vans are formed in areas where there are multiple levels of vanpool formation support. There should, however, be an understanding of the cost-effectiveness of the vanpool formation efforts. To that end, it should be known when different programs support the same vans (i.e. "taking credit" for the vanpool formation). This could be accomplished simply by identifying vans by their driver name or other unique identifying characteristic in addition to their origin-destination pairing.

RIDES also tracks "vans newly registered" as a separate category. These are vanpools that are already formed that register with the ridematching system. The Regional Rideshare Program has not had a hand in helping to form the van, so they do not take credit for this. At the same time, it is important to get those vans into the RIDES database so that in the future, the program can support the van by keeping it full and providing other services and information.

5. The Reporting Strategy

The reporting mechanisms should be structured to achieve the following objectives:

- Identify the purpose of each report and structure the data within the report to meet that purpose.
- Identify the primary audience of each report and structure the report to address the informational needs of that audience.
- Develop the reports so that, as a whole, they tell the full story of the Regional Rideshare Program.
- Develop the reports so that, individually, they stand on their own and tell a key piece of the Regional Rideshare Program story.

- Develop a high-level summary report²³ so that, at a glance, readers can understand the value the rideshare program adds to mobility and air quality, by placing a higher priority on presenting placements made and vehicle trips reduced.

The reporting mechanism should be set up like a “layer-cake”, so that the top layer provides the highest level summary of data (i.e. the most succinct) and could be provided to any interested party and be meaningful to, and readily understood by, the interested party. For those who want to know more about the background data supporting what is presented in the highest-level summary, the next-level report could be provided to that person, and so on. Each report should be organized so that a reader can easily see how the reports build upon each other with increasing amounts of technical information and detail.

Figure 3-6 provides a conceptual plan for how these recommendations could be developed. The recommended reports shown in Figure 3-6 would streamline elements of existing reports into the following “new” or revised reports.

²³ Beginning FY02, the performance monitoring element included the development of an “Annual Report.” This report was not completed at the time the performance audit was conducted. The high-level summary report recommended in this audit would be something provided on a quarterly basis and is not intended to replace this annual reporting mechanism.

Figure 3-6 Recommended Reporting Strategy

Level of Quantitative Detail	Report	Audience	Purpose	Key Element(s)
	Annual Report	Elected Officials, High level stakeholders	Convey value of program Highlight program accomplishments	High-level outcome based summary statistics Features on program elements
<div> <div>Less Detail</div> <div>↑</div> <div>↓</div> <div>More Detail</div> </div>	Quarterly Stakeholder Report	Interested elected Officials, High level stakeholders	Convey value of program	High-level outcome-based statistics
	Monthly Report Card	Funding partners, MTC	Convey value of program to those who have a greater understanding of the data's nuances; Convey progress toward meeting goals	High-level outcome-based statistics Additional detail to support the data presented in the high-level summary Goal Status Summary
	Program Activity Report	MTC, Internal	Program development	Causality data Motivational data Accomplishments by workplan element
	Matchlist & Non-Matchlist Client Survey Results	Any interested party	Document how key tracking statistics are produced	Provide the greatest level of background data to show how the information in the quarterly stakeholder report and monthly report card are produced.

The following section takes a closer look at some suggestions for each of these reports.

Annual Report

Elements recommended for inclusion in the Annual Report are:

- An annual summary of the outcomes-based measurements featured in the Quarterly Stakeholder Report and updated to reflect the FY02 placement rate (e.g. show actual data for the year, instead of estimates)
- An at-a-glance five year trend analysis of the elements included in the Quarterly Stakeholder Report
- Select program achievements

- Summary conclusions from other evaluation efforts that explain the relationships between program activities and program outcomes. Examples from FY02 might include:
 - The outcome of database monitoring and what it means to program direction
 - The outcome of the Rideshare Week evaluation and what it means to future work plans
 - High-level statistics culled from the Commute Profile and what they mean to the Regional Rideshare Program

RIDES currently issues an Annual Report. The report was not reviewed as part of the audit, since it is a new program document that had not yet been produced at the time the audit was conducted.

Quarterly Stakeholder Report

The Quarterly Stakeholder Report would include top-level program results and be directed at the broadest audience of elected officials and other high-level stakeholders. The information included in this report should be presented in such a way that the terminology is readily understood by people outside the professional ridesharing community. This report should be as succinct as possible. The information most desired by a broad audience is:

- Net number of matchlist + non-matchlist clients served in the quarter
- Number of clients placed into carpool, vanpool, transit, bicycle or walking commute modes (i.e. # of placements as determined by using the most recent statistically significant placement rate. The actual placement rate used and its date should be cited.)
- Number of vans formed in the quarter
- Average size of vanpool fleet for the quarter
- Vehicle trips reduced in the quarter (or year to date)
- Vehicle Miles Traveled reduced in the quarter
- Pounds of pollution eliminated in the quarter
- Average number of names in the ridematching database for the quarter
- Pie chart showing percentage of database by origin and destination county

Several of the data items listed above are currently included in the Monthly Report Card and the Monthly Summary. The existing reports, however, can be improved by separating the presentation of “outcomes-based” statistics from the presentation of the program’s ability to meet its goals. These latter measurements should be aimed at those interested in work-plan-element level detail. In addition, the reports should more clearly identify which measurements represent monthly, quarterly, year-to-date, or extrapolated annual figures (e.g.

vehicle trips reduced, placements) and should better define terms (e.g. clients placed). Finally, the quarterly stakeholder report needs to clearly identify the placement rate being applied and the net number of clients served in the quarter; two pieces of information that cannot be extrapolated from the existing reports.

Given its intended audience, this new summary report should be issued quarterly. The report should depict select quarterly trends and present information in terms relative to other transportation programs. More details about the presentation of the information are included in Chapter 9, “Recommendations.”

Monthly Report Card

This document would take the high-level summary provided in the quarterly stakeholder report and provide a greater level of detail so that those who better understand transportation demand management tracking methodologies can see the nuances behind what is reported in the “stakeholder’s quarterly.”

Some of the information that is important to include would be:

- Details of the placement rate used (e.g. breakdown of the five elements that make up placement rate)
- Status toward compiling the current year’s placement rate
- VTR support statistics
- VMT support statistics
- Additional trend line data (see Chapter 9 for more specific recommendations)
- Specific vanpools formed
- Status toward achievement of program goals established in the Scope of Work

Because the Regional Rideshare Program has many different measures that it tracks (see Figure 3-1), it would be helpful if just scope-of-work goals were reported in one comprehensive table. As they are currently reported, the “monthly report card” and “monthly summary” show different targets for the same program elements, and some items do not have any targets. For all the reporting that the program provides, it is not easy to discern whether program goals are being met. Figure 3-7 shows an example of how achievement toward the scope-of-work targets could be clearly presented.

Program Activity Report

The Regional Rideshare Program currently provides a detailed listing of what the program did each month within each work plan element. It is recommended that the program use this information to draw more conclusions or to present some strategic questioning that can be absorbed by those setting the course of the program. It is also an opportunity for the

Regional Rideshare Program to point out any issues with the discrete program elements and activities and to probe for strategic direction.

This report could include the more detailed line-item tracking currently found in the Report Card, such as listings of specific types of commute literature distributed and the sources of information requests. Some people external to the day-to-day management of the program may be interested in this level of program detail, but for the most part, this information is applicable to internal management.

Matchlist & Non-Matchlist Client Survey Results

This report should be organized so that readers can relate the different reports to each other. For example, it would be useful if the data generated by the quarterly survey were organized by the purpose for which it is produced. Thus, the data that is used to roll up into placements and VTR could easily be found as people drill down into the more detailed reports to obtain background information. Data that is used for the purpose of program development (e.g. participant motivation and causality factors between program elements and program outcomes) would be presented under a different heading.

6. Outcomes²⁴

This section shows the outcomes achieved by the Regional Rideshare Program in FY02 and compares outcomes to program targets. Figure 3-7 organizes the scope of work and internal target-driven data in one place so that it is easy to assess whether or not the program met its FY02 targets.

²⁴ Vehicle Trip Reduction and Vehicle Miles Traveled reduced are not shown in relation to the TFCA grant application estimates, since the TFCA fiscal year is not yet completed and available data shows the four quarters that comprise FY02. Therefore the annual results available are not comparable to the TFCA target.

Figure 3-7 Program Outcomes in Relation to Scope of Work and RIDES Internal Targets

	Annual Target	FY02 Achievement	Authority²⁵	Target Met? Y/N
New Matchlists generated	21,600	16,061 ²⁶	Scope of Work	N
Matchlist Updates generated	15,000	11,135 ²⁷	Scope of Work	N
Placement phone calls	15,000	11,686 ²⁸	Scope of Work	N
Average number of active ²⁹ people in the ridematching database at any one time	16,000	12,080 ³⁰	Scope of Work	N
Names in Carpool to BART database	2,500	Data not available	Scope of Work	
Rideshare Week Participation Pledges	10,000	8,130 ³¹	Scope of Work	N
Vanpool driver leads generated from Annual Vanpool promotion	500	42 ³²	Scope of Work	N
Bike to Work Day pledges	9,000	14,138 ³³	Scope of Work	Y
Bike to Work Day energizer stations organized	125	156 ³⁴	Scope of Work	Y
Vanpools formed	96	98 ³⁵	Scope of Work	Y
Active ³⁶ employers in database at any one time	5,000	³⁷	Scope of Work	
Employers enrolling in a Commuter Benefit program after receiving consultation	240	14 ³⁸	Scope of Work	N
Number of transit information requests ³⁹ processed	4,800	Data not available	Scope of Work	
Matchlists with 5 or > names	65%	62% ⁴⁰	Internal	N
Matchlists with 3 or > names	80%	75%	Internal	N

²⁵ Authority means how or by which agency the target is set. For example, some targets are objectives within the Scope of Work, while others are set by RIDES for internal performance evaluation.

²⁶ Per the June 2002 Monthly Summary

²⁷ Ibid

²⁸ Ibid

²⁹ Active means individuals who have confirmed interest in ridematch services within the last five months.

³⁰ Per the June 2002 Program Report Card

³¹ Ibid

³² Ibid

³³ Ibid

³⁴ Ibid

³⁵ Ibid

³⁶ Active means the employer receives regular communication from the rideshare program (mail, e-mail, telephone), their contact information is current and they do not request to be inactivated, either on their own accord or through the yearly update mailing.

³⁷ There are about 5,000 employers in the employer database, but it is not clear how accurate the information is. As of May 2002 only 2,059 (41%) had an e-mail address and not quite half had been contacted between January 2001 and May 2002. See Chapter 5 for more details. RIDES has recently clarified its definition of "active" and is reviewing the accuracy of the database.

³⁸ Per June 2002 Program Report Card. Data not tracked for four months of the year.

³⁹ Transit information requests include providing transit trip itineraries to individuals, using transitinfo.org to provide trip information over the phone or mailing general information about how to take transit.

⁴⁰ Per June 2002 Program Report Card.

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	Annual Target	FY02 Achievement	Authority ²⁵	Target Met? Y/N
Matchlists with 1 or > names	95%	91%	Internal	N
Staffed Events	180	260 ⁴¹	Internal	Y
Matchlist requests from events	4,500	3,230 ⁴²	Internal	N
Commute Literature Distributed	9,000	4,400 ⁴³	Internal	N
Average vanpool fleet size at any one time	825	756 ⁴⁴	Internal	N
Employer consultations per year	100	31 ⁴⁵	Internal	N
New Active Employers	200	232 ⁴⁶	Internal	Y

It is recommended that the Regional Rideshare Program provided a summary table like Figure 3-7 in its reporting so that progress toward goals could be determined at a glance. While this information is included in the Monthly Report Card and Monthly Summary, it is currently difficult to find and decipher these statistics. This type of summary table is a recommended element of the quarterly report card.

Figure 3-7 shows that the program did not meet the majority of its targets in FY02. It should be noted, however, that FY02 has been marked by declining ridership on transit and less vehicular traffic on the roadways given the Bay Area's sluggish economy. The same things that are affecting these travel statistics throughout the Bay Area are surely impacting the Regional Rideshare Program.

This chapter has recommended that the program show its outcome-based results in terms of cost-per-unit. Figure 3-8 summarizes the FY02 outcomes-based results using this strategy.

⁴¹ Per June 2002 Monthly Summary

⁴² Ibid.

⁴³ Ibid.

⁴⁴ Ibid.

⁴⁵ Per June 2002 Program Report Card

⁴⁶ Ibid.

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Figure 3-8 FY02 Outcomes-Based Program Results⁴⁷

	Number	Cost Per Unit (based on an annual budget of \$4,163,000)
Estimated ⁴⁸ Clients Placed	26,115	\$159 per client placed
Estimated Vehicle Trips Reduced	2,929,258 in FY02 11,266 average weekday daily VTR in FY02	\$1.42 per vehicle trip reduced \$369.50 per weekday daily VTR
Estimated Pounds of Pollution Reduced	3,789,027	\$1.10 per pound

⁴⁷ Using June '02 Program Report Card for Source Data.

⁴⁸ Estimated using FY01 matchlist and non-matchlist client placement rate (26.4% and 27.4% respectively). Following the August 2002 Quarterly Database Survey, the FY02 placement rate will be defined and applied to the number of clients served in FY02.

Chapter 4. Stakeholder Interviews

1. Introduction

This chapter summarizes the results from interviews conducted with 27 stakeholders of the Regional Rideshare Program (RPP). The purpose of the interviews, as stated in the scope of work, was “to gain an understanding of possible recommendations for work plan activities, work plan evaluation methods, and strategies for enhancement of Program performance.”

The list of persons to be interviewed was provided by the Metropolitan Transportation Commission (MTC), supplemented by the consultant team’s knowledge of those influential in the commute alternatives field. Stakeholders interviewed included 21 funding partners, comprised of Congestion Management Agencies (CMAs) in the Bay Area, staff of local alternative transportation programs supported by the CMAs, and the Bay Area Air Quality Management District. Interviews were also conducted with four Board Members of RIDES for Bay Area Commuters and two MTC staff members. A list of agencies interviewed concludes this chapter.

The chapter is organized into three sections, according to the type of stakeholder: funding partner; RIDES Board Member; and MTC Staff. Each section includes a list issues or recommendations suggested by the stakeholders in three topic areas:

- Work Plan Content and Implementation;
- Monitoring and Evaluation; and
- Institutional and Coordination Issues.

2. Summary of Findings

The funding partners and the RIDES Board members who were interviewed agreed on a number of key points:

- The Work Plan should set priorities among the tasks.
- The matchlist services are the most important component of the RRP.
- The majority of the RRP’s resources should continue to be directed at commute trips, although some level of effort on non-commute trips is important.
- The RRP should place more effort on promoting alternative modes beyond carpooling and vanpooling.
- The RRP should serve a broader role in the Bay Area than it is now playing.
- The introduction of internet ridematching will enhance the RRP.
- Measurements of the RRP’s effectiveness should focus on results, not process.

- A regional consensus needs to be developed about what the appropriate roles of the RRP and the local programs should be to avoid confusion and overlap of services.
- The regional message about commute alternatives lacks cohesiveness.

However, there are differing views among the stakeholders about institutional problems and their solutions. In particular, there is not a clear consensus on how the funding should be distributed between the RRP and the local County programs. In addition, there is not agreement on the role of RIDES, with the RIDES Board desiring more autonomy and the local County programs advocating that RIDES' status as a contractor be more stringently enforced.

Stakeholders also had differing views on two key elements of the current Work Plan. Some wanted the regional events to continue, but with a fresher approach; others wanted them discontinued as a waste of regional resources. Some rated vanpool formation as a high priority, while others believe that the payback is not significant enough to justify the time and effort.

In concert with the other stakeholders, MTC staff also agreed that the emphasis of the RRP should shift from carpooling to promotion of all alternative modes, that the RRP should target more than just commute trips, and that ridematching was the most important component offered by the RRP. In order to address the multiplicity of information sites about alternative transportation modes, MTC staff indicated their intention to incorporate the RRP into the future design of the 511 phone number and a single web portal. Significant issues they raised for further consideration and discussion with stakeholders included:

- The need to develop a regional consensus on the goals of the RRP and how the contractor's efforts in meeting the goals will be measured;
- The need to better understand which elements of the Work Plan are working and which are not; and
- The need for a higher degree of coordination between the RRP and the local County programs.

3. Funding Partner Interviews

This section includes the comments of representatives from the Congestion Management Agencies and staff from the local programs they sponsor in each of the nine counties and the Air District. In all, 21 people were interviewed: seven in Contra Costa County; four in San Mateo County; two in Sonoma County, two at the Air District; and one in each the remaining counties. Attachment C is a copy of the interview guide.

Work Plan Content and Implementation

Many of those interviewed had not previously seen the Work Plan. This was particularly true of CMAs which have no local commute alternatives program. Most of those, but not all, expressed interest in reviewing it before adoption. However, MTC indicates that the scope of work is distributed to all CMAs for review. A few of those who had seen the Work Plan before adoption felt that they had been given inadequate time by MTC to provide input into it. In general, interviewees noted that the Work Plan failed to set priorities by weighting the importance of the various tasks.

A number of persons believe that implementation of the Work Plan focuses on carpooling and vanpooling to the exclusion of promoting other commute alternatives, such as bicycles, shuttles, flextime, and transit services which cross jurisdictional boundaries. Based on this perception, they said that a \$4 million budget just for carpooling and vanpooling services is inflated. Others, however, noted the importance of the educational role that the Regional Rideshare Program (RRP) plays in the region, which goes beyond carpool and vanpool formation.

Respondents indicated that the Work Plan should continue to focus the majority of its resources on commute trips. Specifically, stakeholders said that 60-100% of resources should focus on commute trips. However, most acknowledged that there are untapped markets in the general public — such as for recreational events and school trips—that are also important to address.

Several CMA representatives said that the importance of individual Work Plan activities depends on whether the region wants to emphasize congestion relief or air pollution reduction. For example, they said, if the RRP's primary goal is to reduce congestion, the focus should be on commuters. On the other hand, if the priority is to reduce air pollution, they pointed out that targeting major, non-commute event trips, such as ball games and charity walks, would be a good use of resources. Similarly, if pollution reduction is most important, one CMA representative suggested de-emphasizing RRP staff time spent on vanpooling, which produces cold starts from single drivers congregating at a meeting point. Their view was that clarifying the mission of the RRP is linked to defining the strategic direction of the Work Plan.

The following are comments on specific elements of the Work Plan. These are generalized comments and do not necessarily represent the viewpoints of every person interviewed.

- **Ridematching.** There was unanimity that the matchlist services are the most important component of the RRP. However, the overall impression is that the database is not current or accurate, resulting in frustration by the public who try to use it. On the other hand, stakeholders believe that simply discarding purged names is wasting a future marketing opportunity.
- **Vanpool formation.** Opinions about the importance of vanpool formation were mixed. Many rated it a key component of the RRP and appreciated the regional

efforts being made. Others questioned the resources devoted to what appeared to be a low impact on regional mode shifts, where only 1% of the commuting population vanpools. Some of these questioned the need for the RRP's involvement, since vanpool vendors are motivated by commissions to aggressively pursue vanpool formation. Other suggestions were to concentrate efforts on specific, targeted commute corridors; to modify the Web site to allow vanpool sign-ups on line; and to provide employee groups with better information about costs and logistics at formation meetings.

- **Employer assistance.** A number of those interviewed stated that more effort should be spent on helping employers actually produce trip reduction plans and pre-tax incentive programs; providing employers with general information is not sufficient. However, those counties that have local programs wanted to provide trip reduction planning to employers themselves. In addition, some mentioned that cities with their own programs (e.g., Palo Alto and Santa Rosa) provide better service than does RIDES. One person suggested that the RRP be available to implement the plans at an employment site, since employers most often do not have the time or personnel to follow through on trip reduction plans. Assisting employers with relocation plans was mentioned as an important service
- **Events.** Interviewees said they did not know the effectiveness of events, because they had not seen any evaluation of their impacts on mode shifts. For this reason, a number recommended abandoning altogether the regional events, particularly Rideshare Week, as stale and unproductive to regional goals. In addition, they said that employer events should be handled at the local level. Yet, those areas that do not have local programs appreciated events, but wanted them updated or refocused. For example, instead of regional events, they suggested that events be tied to specific happenings in a county, such as the opening of a HOV lane or an area-wide festival. A couple of those interviewed said that individual marketing and public relations activities are difficult to quantify but can have value over the long-term for public awareness and should be continued for their educational benefits.
- **Materials.** Respondents generally favored the materials produced by the RRP. They suggested that templates be available for companies to personalize with their own logos. Electronic versions of the materials should also be available for reproduction through the Web site.
- **Commute Profile.** There was general agreement that the Commute Profile was useful and should be continued. A few thought that it looked too glossy and expensive.
- **Media relations.** A number of those interviewed shared the belief that far too few resources are dedicated to advertising, billboards, or highway signs and, consequently, the public is unaware of the RRP.

Recommendations

1. Include stakeholders at an early stage and with adequate time for review and comment on the Scope of Work and Work Plan.¹ Inform CMA Executive Directors about the review process.
2. Set priorities within the tasks in the Work Plan.
3. Expand promotion in the RRP of all commute alternatives, not just carpools and vanpools.
4. Clarify the goals of the RRP regarding congestion relief and reduction of pollution and build the focus of the Work Plan accordingly.
5. Maintain a ridematching database that is current and accurate, and/or demonstrate to stakeholders and the public that this goal has been achieved.
6. Concentrate vanpool formation efforts on specific, targeted commute corridors.
7. Provide more specific information about vanpool costs, van acquisition, and start-up logistics at vanpool formation meetings. Partner with vanpool providers as necessary to be able to do this or let the vanpool vendors take the lead on formation meetings.
8. Modify the Web site to allow vanpool sign-ups on line.
9. Devote more resources to helping employers develop trip reduction plans in areas without local programs.
10. Freshen the approach to events and evaluate their impact on mode shifts.
11. Revise RRP materials to permit local “branding” and make electronic versions available.
12. Heighten awareness of the RRP in the media.
13. Allow the RRP to serve a broader role in the Bay Area than it is now playing so that it acts as a central clearinghouse on TDM (Transportation Demand Management) strategies, innovations, and information.
14. Capitalize on opportunities created by the new online ridematching software. Alameda County hopes to receive a grant to test dynamic ridesharing which, if successful, could be incorporated into the RRP’s internet ridematching.
15. Target multi-jurisdictional corridors that are not served by one transit operator or local TDM program — for example, the corridor from Solano County to Bishop Ranch in

¹ The Work Plan is a more detailed version of the Scope of Work. MTC involves funding partners in the development of the SOW, but the process is not working for the funding partners.

Contra Costa County and Moffett Park in Santa Clara County or the corridor bringing commuters in from San Joaquin County.

Monitoring and Evaluation

Chapter 3 presented a full assessment of the monitoring and evaluation element of the Regional Rideshare Program Work Plan. This chapter explains the funding partners' perspectives on this topic.

The overriding concern of the funding partners is that the program's objectives measure the service produced instead of the service consumed. In other words, the objectives now are tied to the process rather than the results. While all funding partners interviewed expressed frustration that they did not understand the program's accomplishments, three partners stated that they recognize how difficult it is to quantify the program's value. They cautioned that focusing too much on numbers could erode the quality of service, and one interviewee stated that the best use of RRP dollars is on service, not evaluation.

A few funding partners advocated that goals be set by comparing with peer regions' goals. On the other hand, several believe that circumstances in regions are different enough that the Bay Area must figure out its own goals.

The following lists the funding partners' specific concerns about the current monitoring and evaluation methods:

- Most funding partners believe the number of vanpools formed is overstated. In some cases, the partners feel the local agency or the vanpool vendors are more active in forming the vanpool than is the regional agency.
- Several funding partners would like to see the effectiveness of events measured in terms of mode changes that result from them.
- Some funding partners stated that they would like the Account Representatives to be held accountable for the level of awareness or activity in their territories.
- The majority of funding partners want to see county-by-county breakdowns of the number of carpools and vanpools formed.
- Those interviewed want a way to know if the objectives are too high, too low, or appropriate.
- Some feel the RRP should not count people who start taking transit in its placement methodology, because the level of effort the agency puts into providing transit information is minimal.
- Several funding partners do not understand why the placement rate calculation allows credit for mode shifts that are not from single-occupant vehicles.

Funding Partner Recommendations for Monitoring and Evaluation

The funding partners' recommendations for methods of evaluating the RRP include:

1. Keep the evaluation simple.
2. Measure only how many carpools and vanpools have been formed from single-occupant vehicles.
3. Use the Air District's criteria for measurement (e.g., convert all activity to pounds of pollutants reduced, vehicle miles off the road, vehicle trips reduced).
4. Track over time and report retention rate of vanpools and carpools that have been formed.
5. Consider stating the value of the RRP in terms of number of placements into an alternative mode per number of matchlists generated.

Institutional and Coordination Issues

RIDES' Role

A number of the funding partners commented that RIDES continues to deliver the RRP in the same manner as it has always done, rather than changing to meet new circumstances. Several suggested that RIDES needs to be more visible and involved with the CMAs and the transit agencies.

Counties funding their own local programs, want more say over the types of services the RRP offers. They believe that MTC does not treat RIDES like any other contractor, who would be required to adapt to the needs of the clients and funders. These interviewees suggested that MTC could consider making the RRP a department of MTC, instead of contracting out the program, to clarify who is in charge of the RRP.

Local vs. Regional Roles

Although RIDES for Bay Area Commuters has been assisting commuters since its beginnings in the 1970s, local programs in the counties have become more active in providing Transportation Demand Management (TDM) programs within the last 10 years. With the passage of Proposition 111 in 1990, which created Congestion Management Agencies, and passage of half-cent transportation sales taxes in five of the nine Bay Area counties, additional funding has become available at the county level for tackling congestion. As a result, County TDM programs have begun offering services that they believe fill in the gaps that the RRP cannot serve. The following are some of the reasons that the funding partners gave for creating local TDM programs:

- Local programs can offer products, such as vanpool and transit incentives, that the RRP could not afford to offer for the entire Bay Area.
- The territories served by Account Representatives (i.e., one Account Representative for two counties) are too large to provide adequate service. Account Reps cannot realistically be expected to know all the issues and available services in each county. Frequent turnover in Account Reps diminishes the quality of service and causes miscommunication with the local TDM staff.
- Local TDM staff personally know key stakeholders in their counties and, thus, have more direct access to employers and can offer service that is less generic and more customized to the community.
- Local TDM programs provide more depth than the RRP in their outreach and span of services, such as involvement in land use/transportation linkages, welfare-to-work transportation planning, and assistance to businesses too small for the RRP to contact.

In those counties where local programs now exist, interviewees stated that the boundaries between the regional and local programs are blurred. The funding partners suggested that MTC provide stronger direction about what the appropriate role for the RRP is and what the local role should be, in order to avoid confusion and overlap of services.

Counties with local programs expressed concern that Counties contributing approximately the same amount of funds were receiving different levels of service from the RRP. They suggested that the RRP offer a core level of service to all counties. For example, all Counties would pay into the regional system to maintain the ridematching database and other selected services. Beyond the core level of service, all Counties could decide whether or not to buy additional services from the RRP off of a menu. Counties without local programs might choose to purchase additional services, whereas Counties with local programs might prefer to redirect the funds into augmenting their local programs.

Other funding partners suggested that, at a minimum, the RRP should sit down with staff in each county and develop a plan targeting services and goals appropriate for that county. The Account Rep should follow a work plan that clearly delineates his or her responsibilities and those of the County program, so that the dollars directed to commute alternatives are leveraged rather than being used redundantly. Once the work plan for each county is established, they stressed that cross-training at RIDES should occur so that everyone communicates the same message to employers and members of the public.

Multiple regional web sites and phone numbers

Several people commented that there are too many players competing for the public's attention — 817-1717; rides.org; travinfo.org; transit info.org; btwd.org; Spare the Air, etc. They said that the result is a message about commute alternatives that lacks cohesion.

Suggestions to address these problems included:

- Create one Web site portal by which all of these sites are accessed.
- The public should be able to find out information about all commute alternatives, no matter where the initial entry into the system is made.
- MTC should create its own TDM Committee to coordinate the various programs, separate from the information-sharing committee meetings sponsored by RIDES.
- MTC should mesh all the commute alternative programs into one core program housed in MTC rather than contract out the RRP element.

Funding Partner Recommendations to Address Institutional and Coordination Issues

1. Clarify the role of RIDES — whether it is contractor, independent partner of MTC, or quasi-public agency — in delivering the RRP.
2. Provide stronger direction about what the appropriate role for the RRP is and what the local role should be, in order to avoid confusion and overlap of services.
3. Create a cohesive message about commute alternatives by aligning the competing, multiple Web and phone sites.

4. RIDES Board Member Interviews

Four officers of the Board of Directors for RIDES for Bay Area Commuters were interviewed for this performance audit. The interview guide used with the funding partners was also used for the Board interviews in order to gain their perspectives on the same issues.

Work Plan Content and Implementation

Board members agreed that the RRP should promote all alternatives, not just carpooling and vanpooling. One expressed concern that RIDES' emphasis was too slanted toward carpooling and vanpooling to the exclusion of other modes. Although three believe that vanpool formation continues to be an important component of the RRP, one stated that it seems to have a low cost/benefit ratio for the time spent on a relatively small number of vanpools. In terms of the use of staff resources, the board member questioned the value of the vanpooling component as well as the staging of regional events, such as Bike to Work Day.

Board members believe that ridematching is the most important function of the Work Plan. Along with RIDES staff, they are assessing the Work Plan to pull out other tasks with low impact so that the funds can be refocused. One pointed out the need to prioritize tasks in the Work Plan as well as the need to conduct market research to determine if its materials are effective in stimulating mode shifts.

The Board has been discussing whether the focus of the RRP should continue to be primarily on commuters or whether it should also target the general public. Two members explicitly stated that it should be directed at both populations, with one suggesting 60% of the effort on commuters and 40% on the general public.

RIDES Board Member Work Plan Recommendations

1. Set priorities among the tasks in the Work Plan.
2. Expand promotion in the RRP of all commute alternatives, not just carpools and vanpools.
3. Conduct market research on the effectiveness of RRP materials.
4. Determine whether the focus on commuters should be modified.
5. Expand the role of the RRP to be an educational and planning authority that could tackle broad TDM issues.
6. Use the new on-line ridematching software to create databases for individual companies. Employers who now maintain their own company databases could instead use this new on-line service.
7. Expand the RRP's technology capabilities to send information via PDAs, cell phones with connections to the internet, and telematics in cars.
8. Expand the RRP's services beyond the nine Bay Area counties, in particular to San Joaquin County, where a large number of residents commute into the Bay Area. With a new emphasis on technology and internet ridematching, the RRP would not have to be housed in the same physical location as the territory served.

Monitoring and Evaluation

Two board members stated that the level of effort and the costs to evaluate effectiveness should be kept in proportion to the RRP's primary goal of using resources to provide service to the public. With that caveat, the following list represents individual suggestions for monitoring and evaluation proposed by one or more of the Board Members:

- Consider stating the value of the RRP in terms of cost per placement, similar to transit's requirement to state in terms of cost per rider.
- The retention rate of single-occupant drivers who have switched to an alternative mode should be measured.
- Measure outreach effectiveness by the changes in mode at employers who have been contacted by the RRP.
- Measure outreach effectiveness by customer satisfaction surveys.

- The number of matchlists generated remains a key objective.

Institutional and Coordination Issues

RIDES' Role

Board members do not think that being a contractor is the proper role for RIDES. They prefer a partnership relationship between MTC and RIDES, where MTC would delegate authority for the RRP to RIDES, which would retain its own identity.

Board members would like RIDES to be the place for traveler information. They are concerned that there are too many players and their niches are not well-defined. As a result, they believe that the RIDES name and identity are obscured by the competing sites.

Local vs. Regional Roles

Board members believe that a strong regional program is essential. As the regional program, RIDES can talk directly to the public and can see common problems that cross over boundaries or employers' multiple sites. One board member thought that RIDES should become more available to the local programs as an educational tool — for example, creating a model of how a trip reduction program can be set up or increasing its focus on pre-tax incentive packages.

Although Board Members support the concept of local programs, one of them cautioned that the funding cannot be a zero sum game. He pointed out that the entire RRP could be fatally weakened if it were not able to rely upon a stable level of funding. Another stated that the emphasis should continue to be on the RRP, with local programs only filling in any gaps. Otherwise, the RRP would become as balkanized as the transit districts in the Bay Area. Board Members are eager to talk directly to the Counties and tailor the RRP to meet their needs. They stated that MTC has inserted itself as a buffer, leading to miscommunication between RIDES and the Counties.

Board Members' Recommendations to Address Institutional and Coordination Issues

1. Delegate full authority for the RRP to RIDES for Bay Area Commuters.
2. Establish RIDES as the central point for all information on alternative modes.
3. Retain a strong Regional Rideshare Program and define complementary roles for local TDM programs.

5. Metropolitan Transportation Commission Staff Interview

As part of this performance audit, two key staff members of the Metropolitan Transportation Commission (MTC) were interviewed as stakeholders, representing MTC's role as manager for the funding partners of the Regional Rideshare Program (RRP) contract. This section reports their comments and the issues they raised for further consideration in the performance audit or discussion with the funding partners. Attachment is a copy of the MTC interview guide.

Work Plan Content and Implementation

When in 1995 the State Department of Transportation (Caltrans) decided it would no longer fund ridesharing activities in the state, MTC took over management of the RRP. A first order of business was the development of a cost-sharing agreement among the funding partners. Because the county funding partners (the Congestion Management Agencies (CMAs)) previously had little knowledge or involvement with the RRP under Caltrans, the cost-sharing agreement was a time-consuming negotiation, according to MTC staff.

Cost-sharing has continued to be a dominant issue for some of the CMAs. As a result, MTC staff noted that MTC, in its role as fund manager, has not been able to focus on providing strategic direction to the RRP. For that reason, they are proposing to change the source of funding in an attempt to resolve the cost-sharing issue.

MTC has instead relied on RIDES, as its contractor, to initiate strategic direction for the RRP and wants RIDES to continue to provide program direction. MTC staff believes that RIDES, as the implementing agency, is in a better position to be aware of the most current trends in alternative modes. However, RIDES, perhaps partially because of its own organizational changes, does not have a clear process to identify, evaluate, and integrate new ideas, according to MTC staff. Therefore, they believe that RIDES has not been proactive in providing the needed strategic direction for the RRP.

The highest priorities in the work plan, according to MTC, are maintenance of the ridematching database leading to carpool formation, because it is a task unique to the RRP. However, they said that RIDES should not just focus on carpooling but on assisting people to find alternatives to the single-occupant vehicle, whatever mode that might be. Tying into other regional events, such as the opening of Pac Bell Park, was also cited as a valuable component of the work plan, because such events are a high profile way of highlighting alternative modes for many types of trips, not just commute trips.

According to MTC staff, the Commute Profile is well-received and used by the media and planners. However, staff stated that some changes are required to make it more useful and accurate. Specifically, MTC would like the context for RIDES' findings expanded to clarify the methodology that led to its conclusions and explain the circumstances that lead to

differences with other surveys, such as MTC's household survey. They believe that the Commute Profile has potential to be a more useful tool if RIDES' need for consistent questions that create a trend analysis can be reconciled with MTC's need to include new questions that probe for the reasons behind the trends.

MTC acknowledges that the work plan may now spread RIDES too thin and is open to concentrating annually on some agreed-upon elements. Elements would not necessarily be dropped but some might be emphasized in year 1 and others in year 2, for example, rather than attempting to do all elements at the same level of effort simultaneously. An important criterion to MTC for selecting the elements each year would be an evaluation of their past effectiveness.

MTC would also like to create an incentive program by reserving a portion of the funding for implementation of new ideas. The incentive program could be part of the Work Plan or could be open to competitive bids.

In the future, MTC staff sees a need to focus the RRP beyond commute trips in order to expand the program and its relevance. They also anticipate that implementation of on-line ridematching will stimulate interest and growth in the program.

Issues Raised by MTC about the Work Plan Contents and Implementation

1. The need to establish a strategic direction for the RRP must be addressed.
2. The emphasis of the RRP should shift from carpooling to promotion of all alternative modes.
3. The Commute Profile should be expanded to better explain the methodology behind the findings and to probe for the reasons behind the trend analysis.
4. Consideration should be given to focusing on a few different elements in the Work Plan each year.
5. Consideration should be given to creating an incentive program for new ideas.
6. The RRP should target more than just commute trips.

Monitoring and Evaluation

MTC intends to use this performance audit to assist in developing monitoring and evaluation techniques that better measure the contractor's (RIDES) performance. In addition, MTC staff raised the following issues:

Issues Raised by MTC about Monitoring and Evaluation

1. The region needs to better understand which elements of the Work Plan are working and which are not.
2. MTC has not found the Air District's formula (i.e., convert activities to pounds of pollutants reduced, vehicle miles off the road, vehicle trips reduced) to be a useful measurement to evaluate the RRP.
3. The RRP is not interchangeable with the contractor who implements the program, creating a conflict with the desire of RIDES to establish its name and measure public recognition of the name RIDES.

Institutional and Coordination Issues

Introduction of one Bay Area-wide phone number—511—and one Web portal creates the opportunity for a central hub for all information about transportation alternatives to the single-occupant automobile. Accessing the information should appear seamless to the public, said MTC, even though it may actually involve coordination among the multiple partners. For this reason, MTC staff believes a higher degree of coordination is necessary between the RRP and the local County programs than is now occurring.

There are multiple funding partners involved in decisions about the RRP, as contrasted to the program's early years when Caltrans was the primary funding source. Nonetheless, MTC wants to keep the RRP program whole, not split it up among the funding partners. Although responsibilities could shift between the RRP and the County programs, the RRP should ensure that there is consistency of services across county lines. Eliminating duplication of effort or overlap between the Counties and the RRP will not lower the cost of programs, according to MTC, because there are more than enough other tasks to be accomplished by the RRP. Therefore, they pointed out the need for RIDES to be more creative in its approaches, more adaptable to changing circumstances, and more assertive in forming partnerships with the County programs. Their hope is that the performance audit will help stakeholders formulate a regional consensus on the goals of the RRP and how the contractor's efforts in meeting the goals will be measured.

Issues Raised by MTC about Institutional and Coordination Issues

1. The RRP should be incorporated into the future design of the 511 phone number and the single Web portal for information on transportation alternatives.
2. A higher degree of coordination is necessary between the RRP and the local County programs.
3. A Bay Area-wide Regional Rideshare Program should be retained, although a realignment of responsibilities between it and the local County programs should be explored.

4. Regional consensus needs to be developed on the goals of the RRP and how the contractor's efforts in meeting the goals will be measured.

List of Stakeholders Interviewed

Funding Partners

- Alameda County Congestion Management Agency
- Napa County Transportation Planning Agency
- Sonoma County Transportation Authority
- Solano Transportation Authority and Solano Commuter Information
- Contra Costa Transportation Authority and Commute Alternative Network
- Marin County Congestion Management Agency
- San Francisco Transportation Authority
- San Mateo City/County Association of Governments and Peninsula Congestion Relief Alliance
- Santa Clara Valley Transportation Authority
- Bay Area Air Quality Management District

RIDES for Bay Area Commuters Board of Directors

Metropolitan Transportation Commission Staff

Chapter 5. Employer Surveys

1. Introduction

This chapter details the results of an e-mail survey of employers in the RIDES' Marketing Database. The survey aimed to provide statistically significant results on the extent to which employers use specific RIDES services and the value of these services to employers.

The survey is reproduced in Appendix F. Note that some respondents will have received a 'plain text' version without formatting, depending on the compatibility of their e-mail system. The raw cross tabulations are given in Appendix G.

The chapter first presents the key conclusions from the survey. It then outlines the methodology, response rate and characteristics of respondents, before presenting the detailed findings on the role of the Regional Rideshare Program, the value ascribed to specific services, and employers' experiences with ridematching services.

2. Summary of Findings and Conclusions

The following conclusions can be drawn from the results presented here:

- There are significant concerns with the quality of RIDES' Marketing Database, in terms of the accuracy and completeness of the information, and the frequency with which it is updated. It is clear that RIDES is not meeting its target to have 5,000 active employers in the database, even though there are more than 5,000 entries. RIDES needs to update contact information on a more regular basis. Contacts who are not employers, and duplicate contacts at the same employer site, should either be entered in a separate database or excluded when reporting performance against this target.
- There is a wide diversity of opinions as to the importance of RIDES' services in helping employers reduce vehicle trips. While most respondents consider that they would have trip reduction programs regardless of RIDES, however, most believe that RIDES plays at least a somewhat important role.
- Most RIDES' services are highly valued by employers – particularly information on commute alternatives. Even the least useful service – ridematching – was cited as "not useful" by just 12% of respondents.
- Respondents appear to have a good knowledge of the services that RIDES offers.
- In most cases, employers with robust TDM programs are more likely to know that any given service is offered, to have used it, and to consider that it is useful. This is particularly true for on-site consultations. The exceptions are transit information services and information on bicycling, which employers with more modest TDM programs tend to find more useful.

- Most employers have little knowledge of the quality of ridematching services. This suggests that they refer employees to RIDES without following up to learn if they successfully obtained a match.
- Those respondents expressing an opinion, however, on balance believe that ridematch lists are accurate, are provided quickly and efficiently and have sufficient names, but that few employees have found carpool partners through this route.

The detailed recommendations arising from these findings are discussed in Chapter 9.

3. Background

E-mail addresses to employers were obtained from RIDES' Marketing Database. As detailed in the Scope of Work for the Regional Rideshare Program, this database "contains employer information that is used to manage employer contacts, track employer participation in Transportation Demand Management (TDM) activities and connect employers with one another." As well as contact details and background on each firm and its TDM activities, the database shows the date of the last contact between RIDES and the employer.

As of May 2002, there were 5,032 contacts in the marketing database, of which 2,059 (41%) had an e-mail address. The survey was e-mailed to all these contacts. However, there are several issues that affect the response rate, and raise concerns regarding the overall quality of the database and RIDES' success in meeting its targets:

- A large proportion of database entries indicate that the employer has not been in contact with RIDES or vice versa for nearly a year and a half or more (34% with a last contact in 2000 or earlier), or have no date listed for last contact (19%). For purposes of this survey, however, most employers with e-mail addresses have been contacted more recently (Figure 5-1).
- Many e-mail addresses are invalid – that is, messages were automatically returned to the sender with a "Delivery Failure Notification" or similar response. Of the 2059 contacts with e-mail addresses, 454 (22%) of addresses were not valid, generally because the individual no longer works for the company.
- Many contacts listed in the database are not strictly speaking employers, but have simply been in contact with RIDES for other reasons. Although it is difficult to quantify the extent of this issue, examples include elected officials, consultants to RIDES, partner organizations such as Solano Napa Commuter Information, and the League of Women Voters who had contacted RIDES for a transportation survey.
- Some contacts have duplicate records in the database. In other cases, there are multiple records with different contacts for the same employer and employment site. Again, however, it is difficult to quantify the extent of this issue.
- A small proportion of respondents (7%) reported that they had never been in contact with RIDES, or did not know who RIDES was.

- Fifteen people (0.7%) replied to say that they were no longer working on TDM programs. Presumably, these would be identified by RIDES during normal database maintenance.
- Basic information is available for only a small proportion of contacts. For example, just 12% of database records include information on employer size.

Figure 5-1 Employers' Last Contact with RIDES

Year of last contact	All employers		Employers with e-mail address	
	n	%	n	%
No date	952	19%	235	11%
Before 1999	253	5%	19	1%
1999	222	4%	57	3%
2000	1253	25%	364	18%
2001	1648	33%	847	41%
2002	704	14%	537	26%
Total	5032	100%	2059	100%

Source: RIDES Marketing Database, May 2002

Excluding just those employers with invalid e-mail addresses would reduce the database size to 4,578. Even though there are 5,032 listed contacts, then, it is clear that RIDES is not meeting its target to have 5,000 active employers in the Marketing Database. "Active" is defined in the Regional Rideshare Program Work Plan as meaning that "the employer receives regular communication from the rideshare program (mail, e-mail, telephone), their contact information is current and they do not request to be inactivated, either on their own accord or through the yearly update mailing."

The results also suggest that RIDES is not fulfilling the requirement in its work plan to "assure the accuracy, currency and availability of information in the marketing database". The guidelines to be followed are set out in detail in Attachment 1 to the Work Plan, "Database Information Protocols and Procedures".

None of the respondents made reference to the quarterly database survey conducted by RIDES. However, they were not specifically asked about this, and the survey instrument was designed to encourage structured answers.

Response Rate

Restaurant gift vouchers worth \$75 each were awarded to four randomly selected respondents, as an incentive to respond. Figure 5-2 shows the number of responses received. While a 16% response rate was achieved in terms of surveys returned versus e-mails sent, the response rate rises to 21% when only eligible responses are considered.

Twenty-four respondents stated that they had never been in contact with RIDES, or did not know who RIDES was. These responses are included in the description of employer characteristics, but excluded from the rest of the analysis.

Figure 5-2 Response Rate

	Number	Per Cent of Surveys E-mailed
Employers with e-mail address in database	2,059	100%
Invalid address	454	22.0%
Out of office (1)	7	0.3%
No longer working on TDM/not an employer (2)	19	0.9%
Never been in contact with RIDES	24	1.2% (3)
Eligible responses	1,579	76.7%
Valid Responses	337	21.3% (4)

(1) A 10-day deadline was given for responses. This figure refers only to those people whose automatic 'out of office' replies indicated that they would not return until after this deadline.

(2) This figure refers only to those who specifically replied stating that they were no longer working on TDM programs, or were not an employer. The true figure is likely to be many times higher.

(3) This equate to 7% of surveys returned.

(4) Calculated as a percentage of Eligible Responses. This equates to 16.4% of the surveys e-mailed.

4. Characteristics of Respondents

The first four questions asked about the size of the employer, their location, the extent of their TDM program, and the date of their last contact with RIDES. These aimed to provide background information on the characteristics of respondents to help interpret subsequent results and disaggregate the analyses.

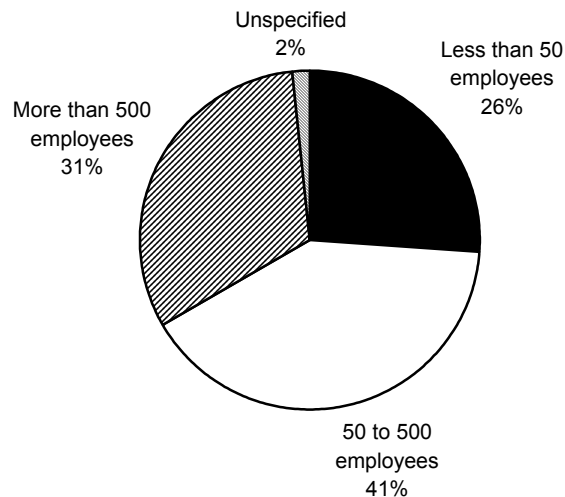
Inevitably, the results will be skewed towards employers who have frequent contact with RIDES and make extensive use of its services – these employers will be more likely to be in the marketing database, have an e-mail address listed, and be motivated to reply. With this in mind, however, a good cross-section of responses was received from different employers. Some specific observations include:

- Small, medium-size and large employers are all well represented (Figure 5-3). Since the marketing database contains incomplete information on employer size, however, it cannot be determined whether the proportions are typical of the database as a whole.
- The more populated Bay Area counties account for most of the responses. Figure 5-4 shows the breakdown by county.

- Employers responding to the survey tend to operate relatively modest TDM programs, consisting of marketing and transportation information services only (Figure 5-5). Nearly one-fifth of respondents do not operate any TDM program.
- Unsurprisingly, the more robust programs tend to be operated by larger employers. For example, 30% of respondents with more than 500 employees operate robust programs, consisting of measures such as marketing, cash incentives for employees not to drive, shuttles and employer-sponsored vanpools, compared to 11% of smaller employers.
- Responses are heavily skewed towards employers who have frequent contact with RIDES. More than half of respondents had been in contact with RIDES within the last three months (Figure 5-6). For comparison, the marketing database indicates that just 14% of contacts have been in touch with RIDES in 2002 (Figure 5-1). Larger employers and those with robust TDM programs tend to have had more recent contact with RIDES.

Little variation in the results is apparent between employers in different parts of the Bay Area. However, there are some significant differences in responses depending on employer size and the robustness of an employer's TDM program. These are discussed below where relevant.

Figure 5-3 Employer Size



Note: For multi-site employers, size refers to the number of employees at the specific location.

Figure 5-4 Location of Respondents

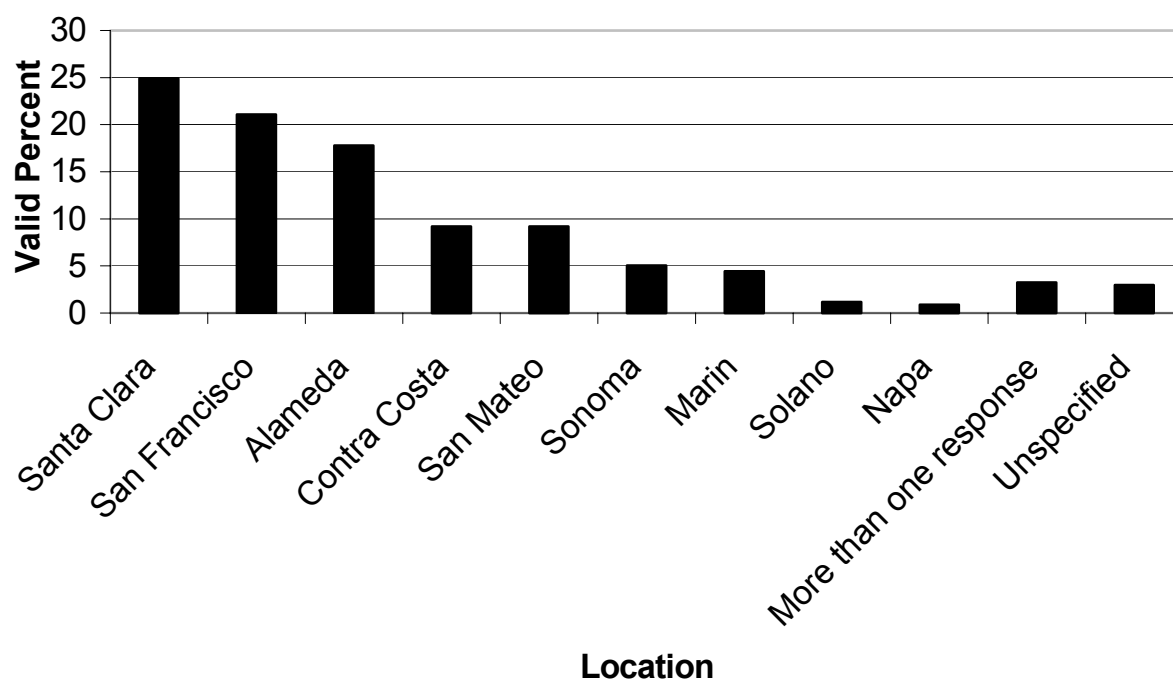
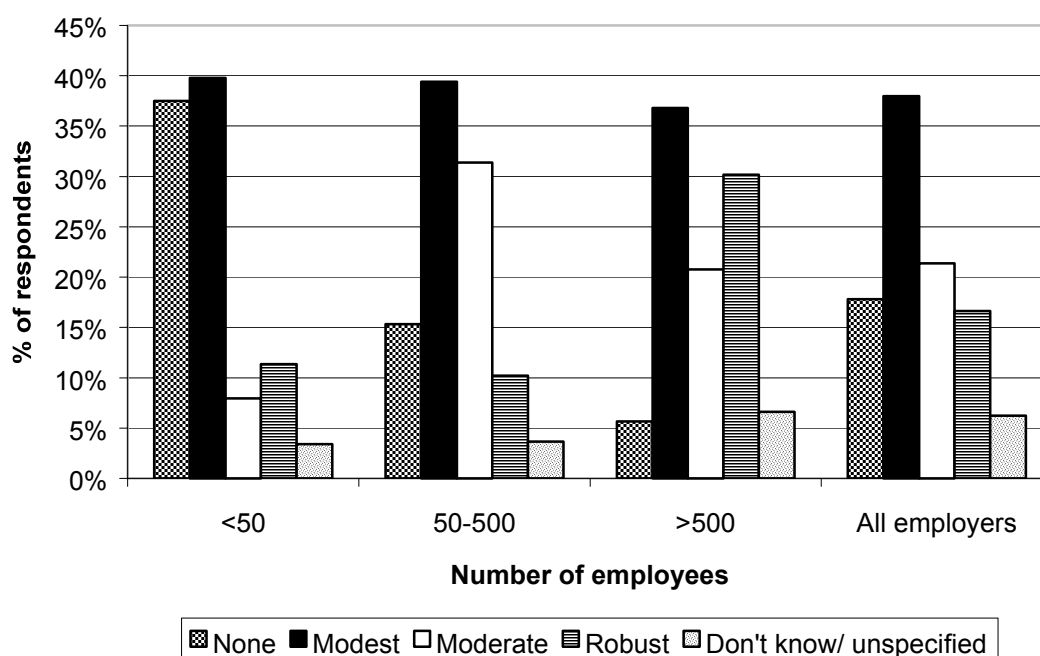
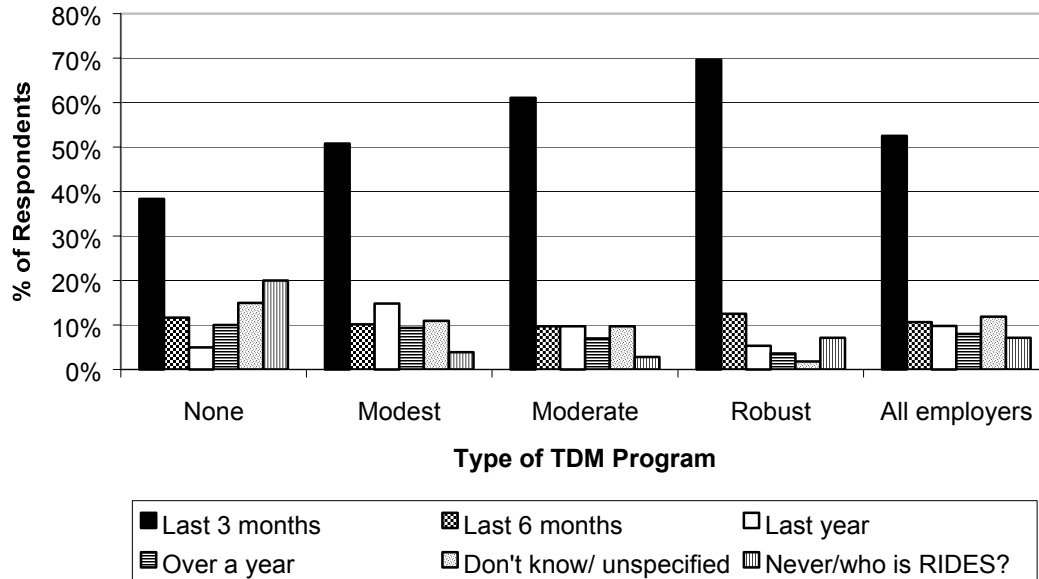


Figure 5-5 Robustness of TDM Programs



Note: The robustness of a TDM program was self-defined by respondents, using the following guidelines: Modest – e.g. marketing and transportation information services only; Moderate – e.g. marketing and information, guaranteed ride home program, prizes, non-subsidized Commuter Checks; Robust – e.g. marketing, cash incentives for employees not to drive, shuttles, employer-sponsored vanpools.

Figure 5-6 Last Contact with RIDES



5. Role of the Regional Rideshare Program

Respondents were asked what role RIDES plays in helping their company reduce single occupant vehicle trips by employees. They were provided with a range of choices, as follows:

- **Critical.** We would not have any trip reduction programs without RIDES' help
- **Important.** It would be much more difficult for us to have our trip reduction programs without RIDES' help.
- **Somewhat Important.** It would be slightly more difficult for us to have our trip reduction programs without RIDES' help.
- **Not important.** We would have been able to implement our trip reduction efforts just as easily without RIDES' help.
- **N/A.** We don't try to reduce vehicle trips by employees.
- **Don't know.**

The results indicate a wide diversity of opinions. A small proportion (5%) consider RIDES' role to be critical, while many other employers (14%) rate it as "not important". Employers are most likely to consider RIDES' role to be "important" (20%) or "somewhat important" (22%). However, it should be stressed that the sample is likely to be biased towards those who place a high value on RIDES services, due to self-selection among respondents, and the

fact that these employers are more likely to have a valid e-mail address in the marketing database.

Large firms with more than 500 employees are more likely to consider that RIDES has an “important” role (Figure 5-7). Those with “robust” TDM programs are more polarized in their responses; they are also more likely to consider that RIDES has an “important” role, but at the same time are also more likely to view its role as “not important” (Figure 5-8).

There are also many smaller firms and firms with modest or moderate TDM programs who consider RIDES to be an important or critical part of their trip reduction efforts. Overall, the percentage that considers RIDES critical, important or somewhat important (47%) exceeds the percentage who find it not important (14%).

Figure 5-7 RIDES Role by Employer Size

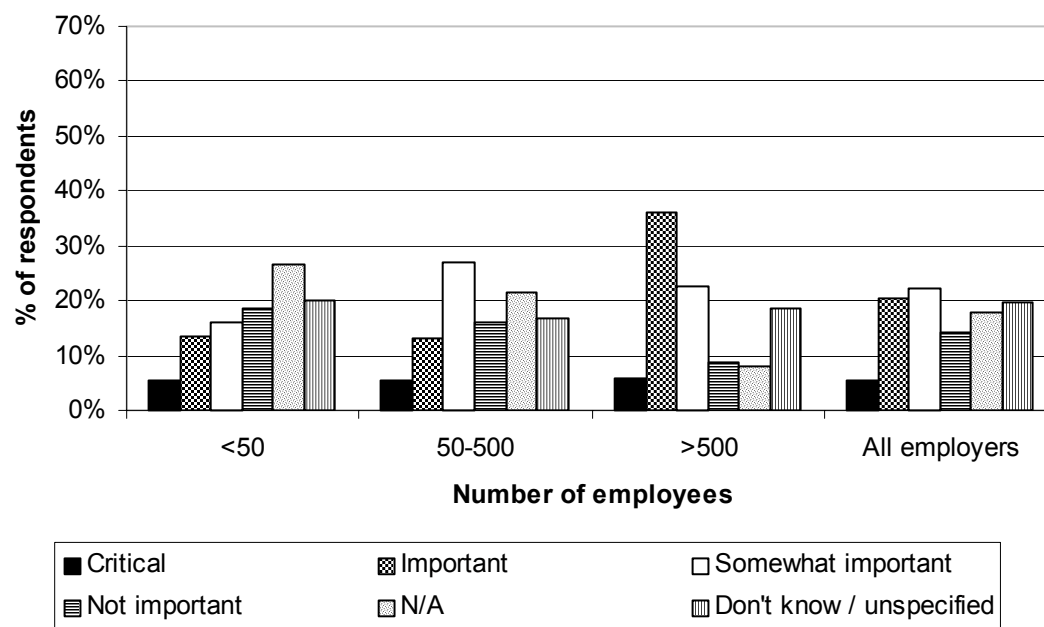
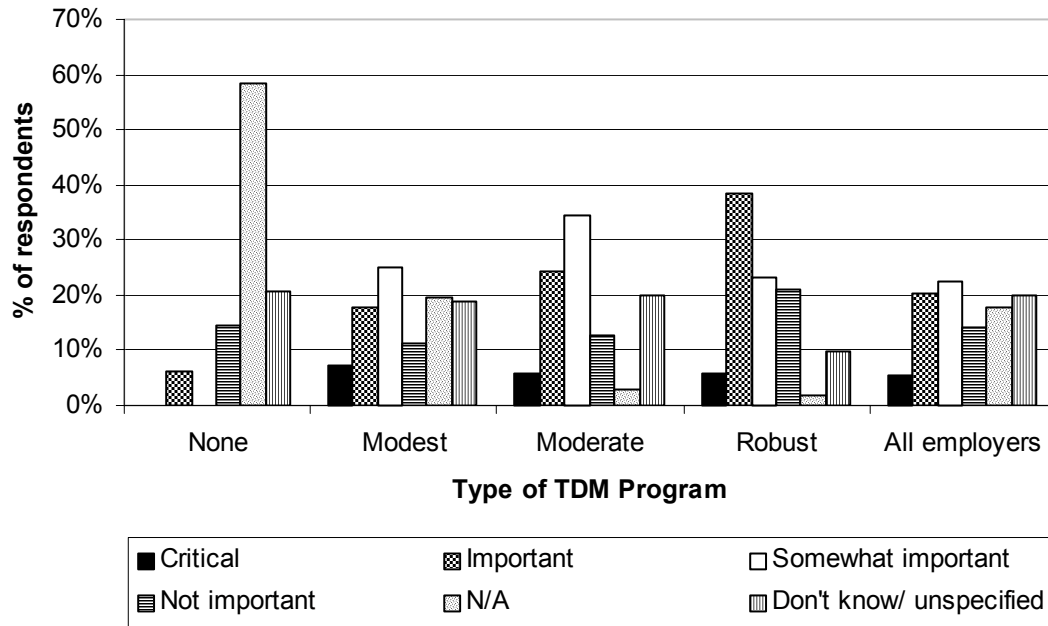


Figure 5-8 RIDES Role by Employer TDM Effort



6. Value of Specific Services

Respondents were asked how useful their company had found a range of specific transportation services provided by RIDES. They were asked to rate each service as “very useful”, “somewhat useful” or “not useful”. They could also state that they had “never used this service”, or “did not know that RIDES offers this service”.

Overall, most employers consider that RIDES provides a range of useful services. Most services received a “very useful” or “somewhat useful” rating from around half of respondents or more (Figure 5-9). The least useful service – ridematching – was cited as “not useful” by just 12% of respondents. An additional 36% said they had never used RIDES’ ridematching service. This could be a function of many employers having internal company matching databases, although the survey did not probe why. Again, however, it should be stressed that responses are likely to be skewed towards those who make regular use of RIDES services and find them useful.

Some other key results include:

- Information on commute alternatives, including printed materials, the RIDES website and presentations by RIDES staff, emerged as the most useful service, cited as “very useful” by 33% and “somewhat useful” by 41%.

- The next most useful services are information on commuter incentives and benefits such as Commuter Checks (28% “very useful” and 31% “somewhat useful”), and information on bicycling (16% “very useful” and 43% “somewhat useful”).
- Ridematching and vanpool services are considered the least useful services. However, only 12% and 11% of respondents respectively rate them as “not useful”.
- Respondents appear to have a good knowledge of the services that RIDES offers. For even the least well-known service – on-site consultations – just 10% of respondents said that they did not know about it.
- The most used services are information on commute alternatives and information on bicycling, with just 17% and 27% respectively stating that they had never used the service or did not know about it.
- The least used are on-site consultations (61% never used or did not know about it) and vanpool services (45%).

In most cases, employers with robust TDM programs are more likely to know that any given service is offered, to have used it, and to consider that it is useful. This is particularly true for on-site consultations and vanpool services. For example, 59% of employers with “modest” TDM programs had never used on-site consultations, compared to 33% of employers with “robust” programs. The exceptions are transit information services and information on bicycling, which employers with more modest TDM programs tend to find slightly more useful than do employers with more robust services (Figure 5-10).

For all services, respondents who rate RIDES’ overall role as “critical” or “important” are more likely to consider that a specific service is “very useful”. For these employers, information on commute alternatives (69% “very useful”), information on commuter incentives (53% “very useful”) and ridematching services (41% “very useful”) are the most useful (Figure 5-11). Employers who see RIDES’ overall role as less important see the same services – information on commute alternatives and commuter incentives – as the most useful, but a smaller proportion rate them as “very useful” (Figure 5-12).

All the different cross-tabulations as well as summary tabulations point to the agreement that the information provided by RIDES is most used by and useful to employers. Not surprisingly, the employers most likely to find vanpool services and on-site consultations useful are those with robust TDM programs.

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Figure 5-9 Usefulness of RIDES Services – All Employers

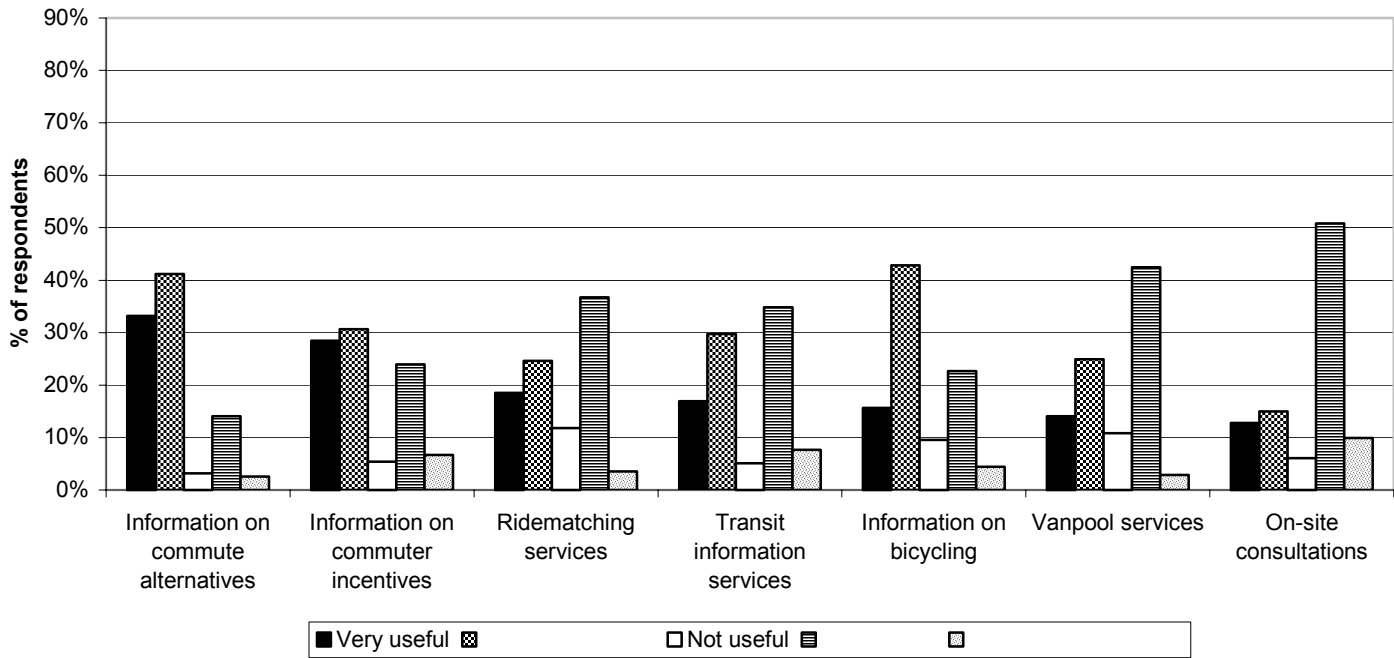


Figure 5-10 Usefulness of Services Against TDM Program Robustness

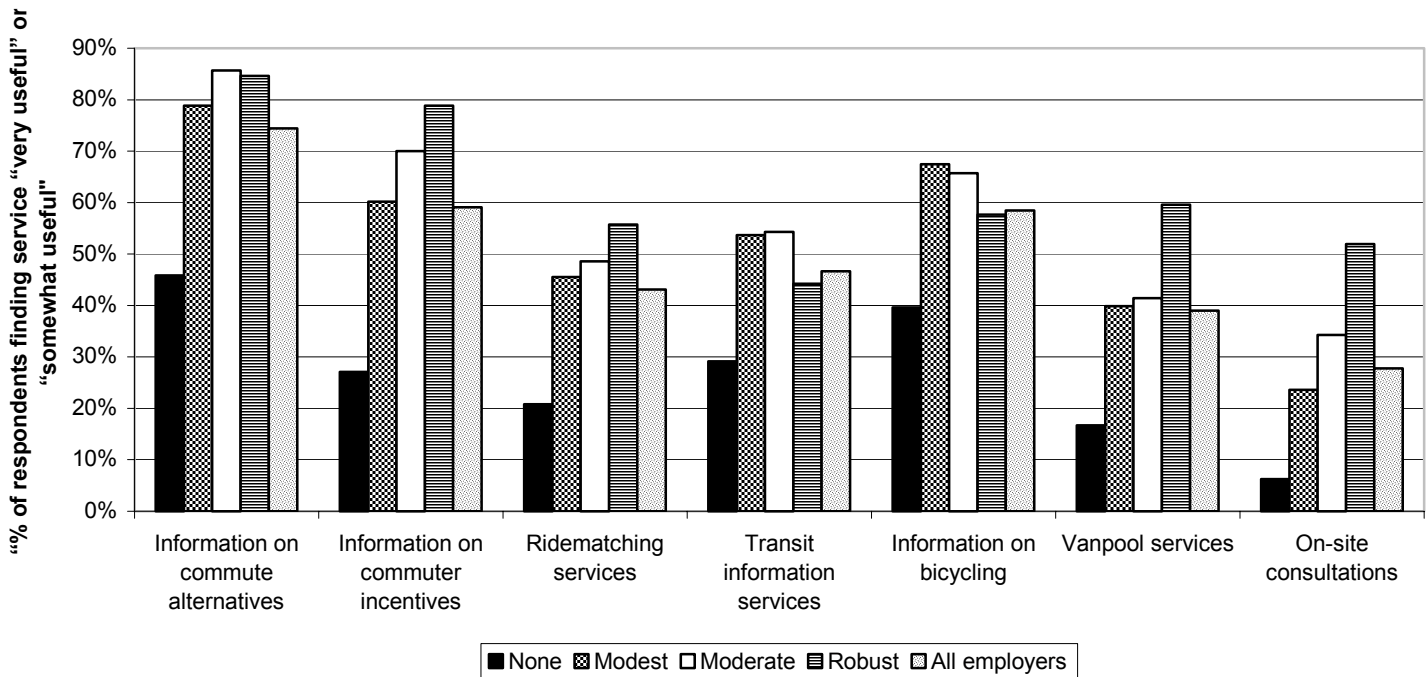
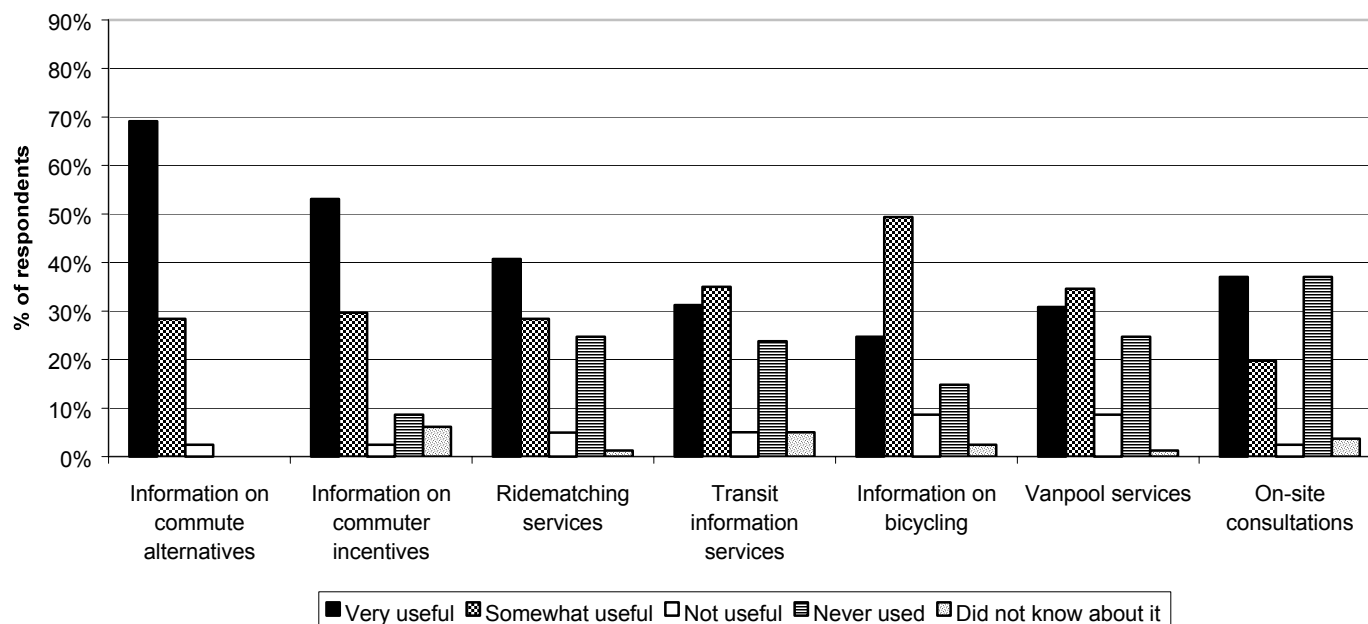
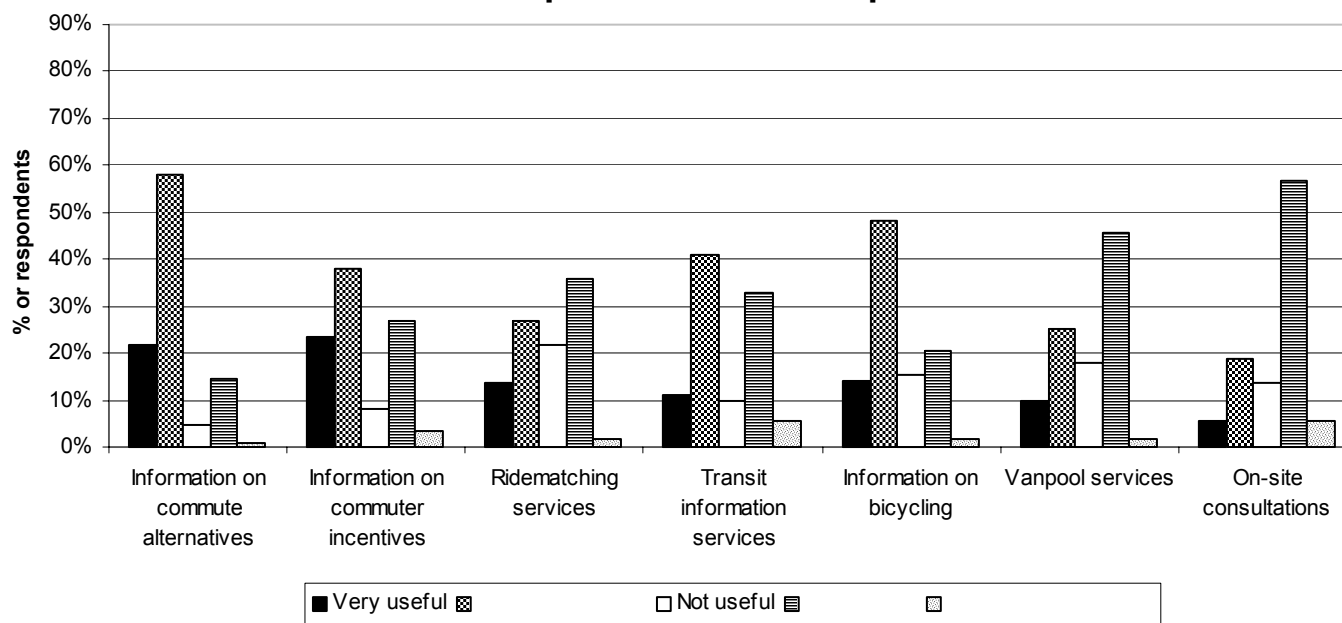


Figure 5-11 Usefulness of Services – Employers Rating RIDES ‘Critical’ or ‘Important’



Note: Figures include only respondents who stated that RIDES' services are "critical" or "important".

Figure 5-12 Usefulness of Services – Employers Rating RIDES ‘Somewhat Important’ or ‘Not Important’



Note: Figures include only respondents who stated that RIDES' services are "somewhat important" or "not important".

7. Vanpooling

Of the employers surveyed, 55% said vanpool services were not useful or had never used them/did not know about them. This is seemingly alarming given the focus of the RRP on vanpools. Vanpool services, however, vary in applicability by employer characteristic. Among employers with more than 500 employees, 62% ranked vanpool services as very or somewhat useful and among employers with robust TDM programs, vanpool services ranked just as useful as other services.

8. Ridematch Lists

Respondents were asked the extent to which they agree with the following four statements regarding the ridematch lists that their employees had received from RIDES:

- The ridematch lists had accurate information
- The ridematch lists were provided to you or your employees quickly and efficiently
- The ridematch lists produced sufficient names for employees to find a carpool partner
- Many of our employees have found matches through the RIDES database

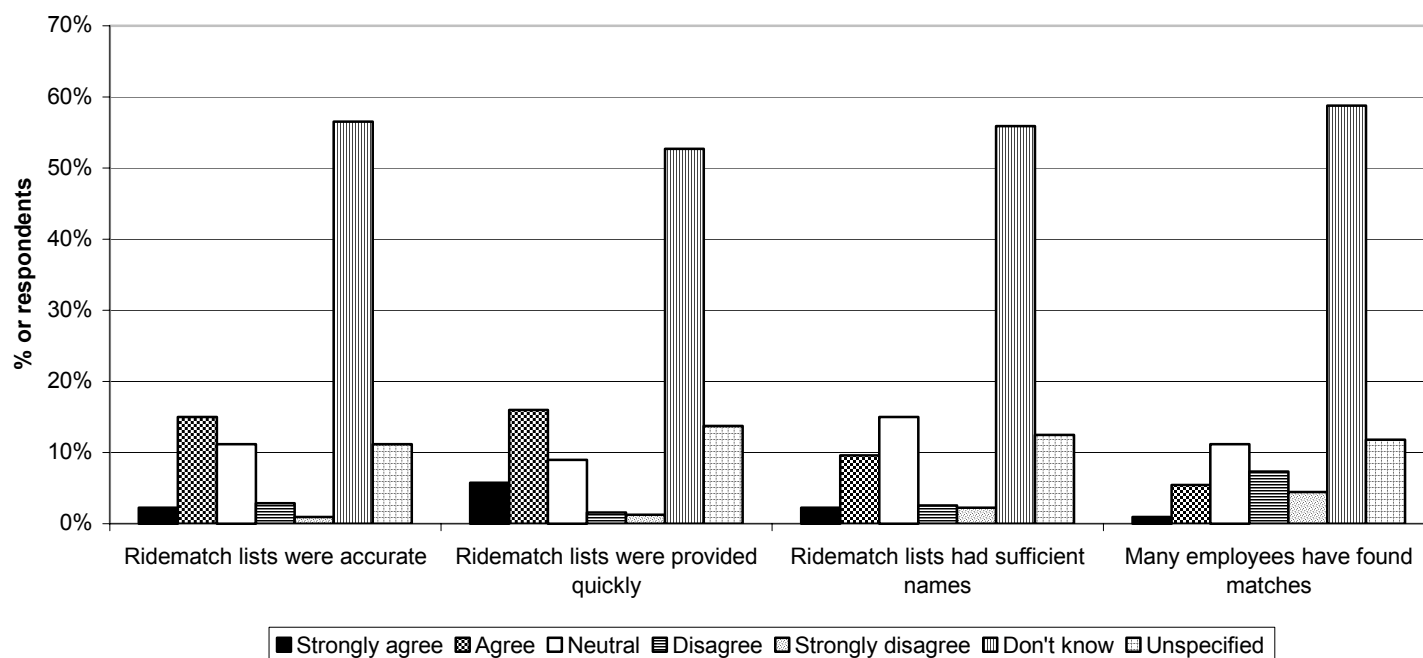
Respondents had six choices: “strongly agree”, “agree”, “neutral”, “disagree”, “strongly disagree”, or “don’t know”.

Overall, most employers appear to have little knowledge of the quality of ridematching services. Around half of respondents answered “don’t know” to each statement, while many others were neutral (Figure 5-13). One possible explanation is that TDM coordinators simply refer employees to RIDES, and do not follow up to see if they were successful in obtaining a match.

Those respondents expressing an opinion, however, on balance believe that ridematch lists are accurate, are provided quickly and efficiently and have sufficient names. More than half agree that the ridematch lists were accurate (53%) and were provided quickly and efficiently (65%), and 37% agreed that the lists had sufficient names with a further 47% neutral on this statement. About 22% of those expressing an opinion agree that many of their employees had found matches through the RIDES database, with 38% neutral and 40% disagreeing.

Employers who consider RIDES’ overall role to be “critical” or “important” tend to have a higher opinion of ridematching services. (These employers are also more likely to use ridematching services.) Of those expressing an opinion, 46% of these employers agree with the statement that many employees had found matches through the RIDES database, compared to just 5% of those who consider RIDES’ overall role to be “somewhat important” or “not important”.

Figure 5-13 Opinions on Ridematch Services



9. Other comments

Many respondents took advantage of the opportunity to add additional brief comments about RIDES or regional rideshare services. Many of these relate to the frustrations and difficulties of trying to promote ridesharing, and the various barriers encountered by TDM coordinators. Others offered praise or appreciation for RIDES and its staff and their general helpfulness, while a smaller number had the opposite perspective, complaining about the poor quality of services or the unresponsiveness of the organization.

Some specific requests include:

- More information on the services that RIDES is able to offer
- Online ridematching, and/or exclusive matching within a particular employer
- Information in Spanish
- Information on school commute alternatives
- More funding for RIDES to expand its education, marketing and outreach activities

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Other comments include:

- RIDES should not be promoting “commuter choice” programs that offer tax-free parking, as this is counterproductive to TDM concerns
- Information on pick-up and drop-off points on matchlists is not descriptive enough, particular for people who do not know the neighborhood
- Web conferencing services could be promoted as a means to reduce customer site visits and enable employees to work at home
- People often hear of new transit initiatives first through RIDES

Chapter 6. Employer Interviews

1. Introduction

This chapter details the results of five employer interviews and a focus group conducted with employers using the Regional Rideshare Program's services. It also includes observations from a Bike To Work Day follow-up meeting held at RIDES, which included several employer representatives.

After discussing some key conclusions and provisional recommendations, the chapter outlines the interview methodology, and then discusses several topics in detail:

- The quality and frequency of employers' contact with RIDES
- Whether employers draw on other Bay Area agencies for transportation advice and information
- Employers' experiences with specific services offered by RIDES, their relative priorities, and any additional services that would be beneficial
- The relevance of RIDES' services to employers with different levels of experience and commitment to Transportation Demand Management (TDM)
- The quality of the services offered by RIDES
- Opportunities for employer input into RIDES services
- Additional specific observations from the Bike to Work Day follow-up meeting

2. Summary of Findings and Conclusions

Even among the small sample of employers interviewed, wide variations are apparent in people's experiences with RIDES. At one extreme, more than one employer views RIDES as largely irrelevant; they continue to run their TDM programs with little input from RIDES, and are dissatisfied with the service quality they have received. At the other extreme, some employers receive a large amount of assistance from RIDES staff – for example with on-site events – and cannot praise the organization and its staff highly enough.

Taken together with the results from the employer e-mail survey (see Chapter 5), this suggests that RIDES is to some extent focusing its limited resources on a small number of employers with which it has established strong relationships. Some employers benefit from a large amount of assistance with on-site events and other programs, while others are unaware that RIDES even offers these services. One TDM coordinator, for example, did not even know that (s)he had an area account representative. More generally, there is a perception among some employers that RIDES targets the "low hanging fruit" – i.e. the larger and most responsive employers, while neglecting others.

Employers see ridematching as the most important service for RIDES to offer, even though many are dissatisfied with the current service. They have high expectations for online ridematching. It will important that RIDES manages these expectations by explaining and capitalizing on the system's capabilities. In particular, RIDES needs to avoid the "vicious circle" that may have reduced the size and usefulness of the existing database, with employers turning to in-house ridematching because of their unfavorable perception of the RIDES database, which in turn further reduces the size of the database. Exclusive ridematching for individual employers will be essential to both improving services to employers and increasing the size of the regional database.

Other key conclusions include:

- Employers – even the experienced TDM coordinators who were interviewed – are often unaware of the full range of services¹ that RIDES offers. There is a need for basic information – perhaps via a dedicated 'employer-only' section of the RIDES website – on what RIDES can offer and who to contact.
- Most employers consider the vast majority of RIDES' services to be useful, and do not consider that those services overlap with other agencies.
- Some employers feel that RIDES is most beneficial for smaller employers with less robust TDM programs, and offers less value to more experienced TDM coordinators.
- Most employers would like to see expanded and/or additional regional rideshare services, particularly more on-site consultations and assistance, networking and training events, and general public marketing.
- Many employers would also like to see RIDES take a stronger role as a 'one-stop shop' in compiling information on commuter incentives, transit services and TDM programs from various sources, and channeling this to employers.
- Several employers would welcome the opportunity to provide input into RIDES' overall work plan, and specific advice on the development of services such as online ridematching. While they believe such input would be valuable, at present they feel that they have no opportunities to do so. The Regional TDM Networking group is one possible forum to solicit this input on an informal basis.
- The success of Bike to Work Day and other regional events is currently measured in terms of the number of Energizer stations, the number of participants (which is calculated on an inconsistent basis between counties) and the smoothness of the overall logistics. It would be useful to evaluate its success in achieving mode shift, both on the day itself and throughout the year.

¹ Chapter 5 concluded that employers have a good knowledge of the basic services that RIDES offers. Basic services means program elements like ridematching and vanpool services, while "full range of services" means things like exclusive ridematching, reports on empty seats in vanpools, etc.

3. Background

Telephone interviews were conducted with the five employers listed in Figure 6-1 during the last week of May and the first week of June 2002. Given the small number of interviews, the aim was not to cover a comprehensive cross-section of different employers. Rather, the intent was to focus on larger employers with established employee trip reduction programs, who could be expected to have a better overview of the work of the Regional Rideshare Program. In addition, an attempt was made to obtain a reasonable geographic spread of employers.

The contact interviewed was the employer's current or former TDM, employee transportation or trip reduction program coordinator. Comments are summarized anonymously. The survey guide used to structure the interviews is provided in Appendix H.

Figure 6-1 Employers Interviewed

Employer	County	Number of employees on site
Chevron	Contra Costa	6-7,000 (3 sites)
City of San Francisco	San Francisco	28,000 (citywide)
Genentech	San Mateo	3,500
Kaiser Permanente	Alameda	3,000
Stanford University	Santa Clara	c.16,000

The focus group was held at RIDES' offices on June 3, 2002, as part of the regular meeting of the Regional TDM Networking group, which is sponsored by RIDES. Around ten employers participated in the focus group, from a broad range of counties including Contra Costa, Santa Clara, San Mateo and San Francisco. While RIDES staff conducted the first half of the meeting, they were not present for the focus group, which was handled by the consultant team. The same survey guide developed for the employer interviews was used to structure the focus group, although the order of some questions was altered and some were rephrased to make them applicable to a larger group.

The Bike To Work Day follow up meeting was held at RIDES' offices on May 31, 2002. The meeting was conducted by RIDES staff, and a member of the consultant team was present only as an observer. Informal comments made after the meeting are also incorporated into the discussion in this chapter.

For ease of reading and to help preserve anonymity, comments made during the interviews, focus group and Bike to Work day meeting are summarized together. Some additional discussion of the Bike to Work day event is provided at the end of this chapter.

The results from the in-depth interviews are given more weight in this analysis than comments expressed by individual employers in the focus group. Where the results and conclusions talk of “most” employers, this generally refers to three or four of the interviewees, plus a consensus from the focus group. This does not imply that the remaining employers necessarily disagreed – indeed, interviewees did not express an opinion on every individual subject. In addition, it should be stressed that the results are not necessarily representative of all employers, given the small number of interviews conducted. Instead, the aim was to probe some of the subjects in more depth than was allowed by the employer survey, which provides broader but more statistically significant results (see Chapter 5).

4. Contact with RIDES

There is a large divergence between employers in terms of the quality and frequency of their contact with RIDES. In one instance, one interviewee reported that the RIDES account representative called to introduce themselves as soon as the interviewee joined the firm as TDM coordinator. At the other extreme, one employer representative did not even know that there was an area account representative, let alone his or her name. Another complained that (s)he only heard from RIDES when solicited for donations.

Turnover of RIDES staff was mentioned by several employers as a factor that had made it difficult to maintain contact. Several interviewees also consider that the frequency of contact has declined in recent years; this was attributed variously to reduced RIDES staffing since deregulation, or to the self-sufficiency that grows with experience as a TDM coordinator.

5. Use of Other Agencies

Most employers do not use any other agencies to provide information on commute reduction programs, apart from schedules and other basic transit information. The exceptions are in Contra Costa, where employers obtain information on incentive programs from the West Contra Costa Transportation Advisory Committee and the Tracs website.

In general, RIDES services are not considered to overlap or duplicate those of other agencies. Employers are confident that they knew where to turn to obtain the correct information. However, one person complained that RIDES services overlap with those of Transportation Management Associations, arguing that RIDES should refrain from targeting employers in the TMA areas.

6. RIDES Services

Most employers feel that they have a good knowledge of what RIDES can offer them. However, they are often unaware of specific services – such as the reports to employers that detail empty seats in vanpools – that RIDES offers, and in several cases asked for RIDES to provide services that it already provides.

Ridematching

Ridematching, for both carpools and vanpools, is considered by all employers to be by far RIDES' most important function. This is true regardless of whether an employer makes extensive use of these services.

Two employers expressed satisfaction with the size and quality of the RIDES database. While they have little sense of the number of matches produced or the number of their employees that had found matches, they feel confident in referring people to RIDES – in one case on the basis that they receive few complaints from employees. They also consider that ridematching is beyond the scope of an individual employer, and is a function that only an outside agency can provide.

Most employers, however, are extremely critical of the size and quality of the database. Complaints include:

- Too few names per matchlist
- Out-of-date names on matchlists
- Irrelevant matches (e.g. ones that would involve a long detour to pick someone up)
- Inaccurate information on pick-up and drop-off points
- Long turnaround times to produce matchlists

Many people stressed the importance of exclusive ridematching – i.e. the ability to request matches only from the same employer. This can reduce the 'intimidation factor' of asking a potential carpool partner to call a complete stranger, as well as being logistically easier for the carpool partners. While this function already exists in RIDES' software, most people (both employers and RIDES staff) appear either not to know about it, or do not know how to use it.

These two issues – the poor quality of the RIDES database and lack of (or lack of knowledge of) exclusive matching – have prompted many employers to do ridematching in house, using their human resources or parking permit database – in some cases at considerable effort. In one case, the TDM coordinator also makes the calls to potential partners, to reduce the risk of 'personal rejection' feelings if someone declines to carpool. However, these employers may also refer people to RIDES as a last resort, after attempting to find them in-house matches.

Although employers commented that RIDES did assist in filling vanpool seats – particularly through passing information on empty seats to employers – the poor quality of the database is felt to be a major restraint. Vanpool operators such as VPSI and Enterprise are considered to be helpful in filling seats in vanpools, and craigslist.org was also mentioned as a useful source.

Employers have high hopes and expectations for online ridematching, in terms of improvements to data accuracy and increasing the size of the database, so that there is a larger pool of potential matches to draw from. This would be useful for vanpool formation, as well as carpools. Several employers said they would cease their in house matching efforts if online ridematching proved successful.

Some comments from employers regarding the services that online ridematching should provide include:

- Exclusive matching, with a prompt for the user to expand the search to other firms if no matches are found
- The ability to include the ridematch form in a corner of an employer's own website or intranet, providing a sense of 'seamlessness'

Vanpool Formation and Promotion

Employers tend to see RIDES as a springboard to launch new vanpools, through providing materials and organizing formation meetings. Many expressed a strong desire for RIDES to do more in the area of vanpool support, in particular through streamlining the driver recruitment process through arranging medicals and providing training. There was some disappointment that the Smartpool program, a vanpool program targeted at shorter-distance commutes in which RIDES leased the van rather than the driver, no longer exists. Several employers reported that finding sufficient drivers, rather than passengers, is the major barrier to vanpool formation.

Employers consider that RIDES has not been so successful at filling seats, largely due to issues with the ridematch database. One employer complained that the monthly vanpool reports are difficult to read, and often contain out-of-date information. However, the follow-up calls to check whether there are any spare seats in vanpools, and then passing this information to employers, are highly valued.

Overall, all the employers see vanpools as an important element of a trip reduction program, and consider this to be an area where RIDES can be even more useful than they are now.

Materials Promoting Transportation Alternatives

There were no complaints and a significant amount of praise for the quality of RIDES' materials promoting transportation alternatives, which TDM coordinators often distribute

among staff themselves. A recurring comment was that employers lack the resources to produce such materials themselves. Many interviewees expressed a desire, however, for RIDES to produce electronic copies of all its materials alongside the printed versions, so that the file or website link can be e-mailed easily to employees, and be customized with the employer's own logo and contact details.

Many employers think highly of the RIDES website, and some provide links from their intranet to specific web pages such as the ridematching form and commuter cost calculator. However, apart from the comments that more materials need to be available electronically, there were several complaints about the speed with which the website is updated. In addition, some other employers are unaware of what is offered on the RIDES website – including ones who had regular contact with RIDES and made extensive use of its services.

One employer specifically mentioned the e-newsletter as a useful new resource.

On-site Services and Events

Several employers feel that RIDES provides little in the way of on-site services such as assisting with events, and there is a sense that the amount of help that is available has declined in recent years. However, TDM coordinators that do receive regular assistance with events were extremely complimentary of RIDES staff, in terms of their enthusiasm, responsiveness and organization. They see these events, such as tablins and transportation fairs, as an important way to raise awareness among employees, and to distribute information on commute alternatives and incentives, and in some cases ridematching forms.

RIDES appears to be providing excellent on-site services, but covering only a small proportion of employers with these. Indeed, one specific complaint was that RIDES' account representatives are spread too thinly, with just one individual to cover Contra Costa and Alameda counties, for example.

Regional Events

Although employers are just one stakeholder group for the regional events organized by RIDES, such as Bike to Work Day, those interviewed are highly satisfied with them. As with the on-site events, they see them as an important way to generate awareness among employees and disseminate information. Several employers specifically mentioned that they time their own events to match these regional ones, and put in significant amounts of their own resources – suggesting that the regional events are highly valued. Although this is not part of the Regional Rideshare Program, Spare the Air was also mentioned as an important event.

One comment was that regional events have a dual role in raising awareness among employees, and generating political support among elected officials for rideshare activities.

Another interviewee noted that employees express surprise or disappointment when no event is arranged – for example on Earth Day this year. However, a further comment was that it tends to be the “usual suspects” among employers who participate in the regional events, and that more effort needs to be made to bring in new employers.

Networking and Training

Several employers see networking and training opportunities as one of the most important services that RIDES can offer, although many are unsure of the extent of the services that RIDES provides in this area. One employer expressed great disappointment that the number of training and networking events appeared to have declined over recent years.

The training event in the Presidio is seen as a good example of the sort of event that RIDES should be holding – both to bring newer TDM coordinators up to speed, and to provide networking opportunities. For more experienced coordinators, networking events are felt to have two important functions:

- Sharing best practices
- Reducing any feeling of isolation for TDM coordinators, and helping to “validate their existence”

Perhaps obviously, focus group participants consider that the Regional TDM Networking group provides an extremely valuable networking opportunities.

Other Services

Other RIDES services mentioned by employers as valuable include:

- Relocation assistance.
- The online employee TDM survey.
- Information about pre-tax commuter benefits. However, one interviewee commented that public awareness of these benefits needs to rise, as many employees do not know that they are available.

7. Additional Services

Several employers expressed a strong view that a key part of RIDES’ function should be to package the programs and incentives from different counties, particularly for inter-county commutes. RIDES staff needs to know everything about every county’s program in detail, and piece together these programs for individual commutes – particularly for firms relocating both within and to the Bay Area. This does not mean that RIDES services would need to overlap with those of counties and other agencies, but rather that RIDES should be

able to pull together their different programs into a coherent package for both employers and individual employees.

In other words, RIDES should function as a 'one-stop shop', many employers consider, pulling information together from different transit agencies, counties and other transportation providers. It should then filter this information down to employers, including details of new transit services and updates on BART strikes, for example. While employers recognize that RIDES is doing this to some extent at present, they believe that its services could be more comprehensive, obviating the need for them to consult different agencies and websites.

One employer suggested that it would be extremely valuable for this 'one-stop shop' role to extend to advice on how to actually implement a TDM program, as well as the information on commuter benefits and transit services. While there is a huge volume of information available, on the Internet and elsewhere, it is difficult for an individual TDM coordinator to sift through this, particularly if they are new to the role. A 'Bay Area TDM Encyclopedia' or similar handbook for TDM coordinators would be ideal, suggested the employer, specifically mentioning the TDM Encyclopedia produced by the Victoria Transport Policy Institute (www.vtpi.org) as a possible model. Another employer thought that RIDES could provide more ideas for TDM coordinators on 'how to get started' with their programs.

The RIDES website was felt by one employer to be important here. At present, it is very "consumer oriented," and a separate section for TDM coordinators would be valuable. At a minimum, this should include contact details for account representatives, and the existing RIDES materials aimed at employers, according to the interviewee.

Additional services that employers feel would be valuable include:

- Automated kiosks offering transit trip planning and online ridematching, to station at employment sites.
- A pool of discretionary funds that RIDES could use for incentive programs. Regional promotions are felt to be especially important for employers that cannot offer their own cash incentives to their staff.
- More on-site assistance, both in terms of helping employers to develop tailored commute trip reduction programs, and organizing events.
- More marketing, particularly for pre-tax commuter benefits. There is a widespread feeling that reduced general public marketing in recent years has damaged the Regional Rideshare Program, as there is less awareness regarding the services that it can offer.

One employer stressed the need for RIDES to integrate its services with other organizations. Since most people never consciously think that they need carpool or transit

information, RIDES services should be marketed through other outlets, they suggested. For example, the online ridematching form could be included in the corner of other websites.

Several employers also mentioned online ridematching, and were unaware that this was to be implemented shortly.

Although this is not a service of the Regional Rideshare Program, one TDM coordinator sees the potential for the Take Transit trip planner to be a key resource in offering employees comprehensive information on commute alternatives. At present, however, they consider it too inaccurate and incomplete to recommend to employees.

8. Service Priorities

Virtually all employers see ridematching as by far the highest priority service for RIDES to offer. Even those that currently do their own 'in-house' ridematching believe RIDES is an important backup to offer employees when the in-house system does not produce a match.

Beyond ridematching, employers are generally reluctant to prioritize RIDES' services. However, some other priorities include:

- Raising public awareness. One employer noted that employers could reach out to employees themselves, but that RIDES is the only organization attempting to communicate with the general public on commute alternatives.
- Promoting vanpools, in particular through providing detailed information to prospective users, and troubleshooting problems encountered by drivers.
- Publicizing pre-tax commuter benefits.
- Networking and training events.

While all but one of these services are targeted at commuters, rather than directly at employers, the interviewees consider that they provide essential support for employer TDM programs.

Employers also mentioned some services that are not in the Regional Rideshare Program, such as Guaranteed Ride Home and Spare the Air, as important priorities. In other words, employers tend not to have a clear idea of which services are part of the Regional Rideshare Program, but view them as part of a whole, suggesting that RIDES is at least partially fulfilling the role of the 'one-stop shop'.

Interviewees are even more reluctant to specify their lowest priority services. This may partly reflect the high value they ascribe to all of RIDES' services, and partly the fact that they are less likely to be aware of services that they do not use. When pressed, however, two employers mentioned Bike to Work Day and other regional events. Although they value these regional events, they consider that they provide fewer direct trip reduction benefits to an employer, although they are good for the employees who participate. In

other words, they may reward those employees who already carpool or cycle to work. One interviewee qualified this, however, by stating that Bike to Work Day should continue, even if RIDES were to cease organizing it.

One employer also questioned whether RIDES makes the best use of its resources, pointing out that a large number of RIDES staff attend the same meetings.

9. Relevance of RIDES

Employers tend to agree that RIDES is a useful resource to help newer, less-experienced TDM coordinators get up to speed, and for those at smaller firms with fewer resources. There is less agreement on whether RIDES is also important for employers with TDM programs that are already well established.

Most – but not all – interviewees tend to consider that these well-established TDM programs would continue regardless of RIDES, although RIDES is a useful supplemental source of advice and information. Since their programs tend to have been long established, they were unable to comment on whether RIDES was a catalyst in getting them started. However, there is also a feeling that RIDES is important in creating a wider awareness in the Bay Area about alternative modes, that local programs alone cannot do with their narrower geographic focus. In other words, RIDES can provide support, serve in a back-up capacity, or provide the preconditions for employer programs to succeed.

10. Quality of Services

There is a wide divergence in opinions between employers regarding RIDES' service quality. Some offered high praise for the enthusiasm, knowledge and professionalism of RIDES staff, while others complained of requests that went ignored, slow response times, and lack of follow up. Some specific service quality issues raised by these employers include:

- The poor quality of RIDES' marketing database, with out-of-date contact information for employers
- Glitches with the online TDM survey
- Poor communication between RIDES and employers, for example in keeping TDM coordinators informed on forthcoming events and meetings
- Delays before materials are posted on the RIDES website
- The impact of high RIDES staff turnover on service quality

Several employers feel that the quality of RIDES' services has declined over recent years, both in terms of the amount of assistance available, and the responsiveness of RIDES staff.

11. Employer Input

Many employers – both those interviewed and those in the focus group – expressed a strong desire to have more input into the RIDES work plan and goal-setting process. One recurring comment was that employers do not even know what is included in RIDES' current work plan, let alone have the opportunity for input. Several employers mentioned specific services, such as the online TDM survey and the forthcoming online ridematching services, that could be improved or better tailored to meet their needs, if RIDES had solicited input before implementation.

Focus group participants expressed no strong opinion as to whether employer input should be channeled through the existing Regional TDM Networking group, or through a more formal Technical Advisory Committee. One employer, however, stressed the need to keep input on an informal basis, and avoid unnecessary bureaucracy.

12. Bike To Work Day

This section provides some more detailed observations from the 2002 Bike to Work Day follow-up meeting, where these have not been discussed in the sections above.

Overall, Bike to Work Day 2002 was considered a success, both in terms of better organization and increased participant numbers compared to previous years. However, many people believe that it should also be viewed in terms of its ability to stimulate ongoing efforts throughout the year, rather than simply being a one-day event.

There was some implicit debate regarding whether RIDES should be coordinating Bike To Work Day at the regional level, and/or implementing it on the ground locally. In some parts of the region, local implementation is performed by partners such as bicycle advocacy groups, who coordinate the distribution of supplies and staffing of Energizer stations, while in other counties RIDES liaises directly with the organizers of individual Energizer stations. The present arrangement has the advantage of ensuring coverage in areas where there is no strong local partner, although one option might be for RIDES to pass through money for implementation to local staff (possibly part-time or temporary) employed by cities or bicycle advocacy groups.

This is particularly true in the areas of sponsorship and publicity. Apart from a plan to indicate which specific media outlets or potential sponsors should be targeted by RIDES and which should be left to local partners, one view (not necessarily universally shared) was that it should be questioned whether RIDES should be pursuing sponsorship opportunities at all. The amount raised is low in relation to RIDES' overall budget, and local partners may be able to make better use of the sponsor funds. This would also allow local customization of the side of the give-away bags that is currently used for sponsor logos.

Evaluation

There is no clear methodology at present for evaluating the success of Bike to Work Day. Even basic figures, such as the number of participating cyclists, are calculated on an inconsistent basis. In some counties, they refer to the number of cyclists passing by Energizer stations, while in others they refer to people signing the registration sheets – which may be a high or low priority for the volunteers running the stations. People can also register by fax and web. This inconsistency is significant if RIDES' target for 9,000 Bike to Work Day pledges is to be measured in a meaningful way.

In particular, there is little data on how successful Bike to Work Day is in persuading people to cycle for the first time, or whether it simply rewards existing cyclists rather than contributing to mode shift. While there were isolated efforts in some cities or counties to track the number of new cyclists – for example through traffic counts, or asking registrants if they have commuted by bicycle before – there are no region-wide data. This is important if the effect of Bike to Work Day (and other regional events) in terms of promoting mode shift, rather than simply rewarding those who would have cycled anyway, is to be evaluated, and compared against other activities in the Regional Rideshare Program.

There was some consensus that the number of Energizer stations may be a poor guide to the success of Bike to Work Day. While in the past, more stations may have been beneficial, the optimum level may now have been reached. More stations would spread resources too thinly, and stations would risk competing with each other.

Chapter 7. Regional Rideshare Program Deliverables

1. Introduction

The Regional Rideshare Program work plan includes the preparation of several deliverables submitted to the Metropolitan Transportation Commission. This Chapter assesses the general quality of these deliverables and their effectiveness in achieving their purpose. Between July 2001 and March 2002, RIDES prepared eleven deliverables for the MTC. This review looked at eight of those deliverables. Deliverables chosen for review included all that had been prepared year-to-date with the exception of plans for future work elements, such as the Bike to Work Day promotion plan, the communications plan and the Vanpool Campaign Plan. Commenting on these planning efforts was outside the scope of this review.

2. Summary of Findings and Recommendations

- Not all deliverables meet their intended purpose as defined by the RRP Scope of Work or Work Plan. Others meet part, but not all, of the stated purpose.
- Not all deliverables clearly state their intended purpose and explain how they will accomplish that purpose.
- Conclusions and findings should be supported with illustrative figures or tables, so that they can be more easily understood and be more useful to broader audiences.
- The deliverables would benefit from more recommendations or conclusions about what the findings mean for program development or the significance of the finding to program activities.
- When there is not enough information to make recommendations or draw conclusions, the documents should summarize the strategic questions that need to be answered in order to make the recommendation needed.
- Deliverables that are more technical would benefit from a third-party review to ensure that their messages are clear.
- Based on lack of comprehensiveness of some of the deliverables, it is recommended that the deliverables that are new to the work plan be task-based elements in the work plan with specific budgets. This will help define the breadth of the deliverable and allow the contracting agency to withhold payment if the deliverable's objectives are not satisfied.
- Funding for studies/deliverables that are new to the RRP work plan (e.g. the Rideshare Week evaluation, the New Ideas Recommendations Memo, and the Regional Incentives Recommendations Memo) could also be separated from the

Regional Rideshare Program contract. MTC could use these funds to outsource this work through competitive bid. While the amount of funding available for these deliverables may not warrant this type of administration, this strategy would ensure quality and create a more competitive environment for elements of the RRP contract.

- Require that an outline of the topics to be covered in new deliverables be submitted prior to the completion of the deliverable.

3. Background

Through the contract Scope of Work, the Regional Rideshare Program is required to produce several specific deliverables each year. The topics of these deliverables vary from year to year, based on the needs of the program. Because each deliverable is unique, it is difficult to make broad conclusions about their collective quality. As such, no conclusion applies to every deliverable. It should also be noted that a review of this nature is, to some extent, subjective, as the reviewer's perception of "quality" is inherent in the process. The consultant reviewed the deliverables according to the following dimensions of quality:

- Comprehensive Coverage of the Topic
- Ability to Fulfill the Intended Purpose
- Presentation
- Recommendations or Conclusions

The consultant reviewed the following deliverables prepared by RIDES between July 2001 and March 2002:

- Regional Incentives Recommendations Memo
- California Rideshare Week 2001 Participant Survey Report
- Meeting Minutes from TDM Network Group
- Ridematch System Evaluation Report
- New Ideas Recommendations Memo
- Database Monitoring Report
- Electronic TDM Survey Instrument
- Event Screening Criterion Memo

The assessment of each deliverable is presented in the following sections and a summary table concludes the review.

4. Deliverables Assessment

California Rideshare Week 2001 Participant Survey Report

The FY02 Work Plan required RIDES to “determine the effectiveness” of two promotions by conducting participant surveys. Rideshare Week was selected as one of these promotions. The Work plan stated that the evaluation should:

- Determine the effectiveness of the promotion
- Explore opportunities to improve the effectiveness of the promotion
- Explore the effects of the promotion on individual transportation choices.

The California Rideshare Week 2001 Participant Survey Report explores the effects of the promotion in detail and provides a great deal of interesting information. The report, however, does not conclude if the promotion is “effective.” The deliverable fully explores the question, but does not recommend whether or not to continue the promotion, and for what reasons. Neither the deliverable nor the work plan define “effective.”

The report would benefit if more criteria and definitions were presented to illustrate how the event’s success were going to be assessed. It would also be useful if the criteria were displayed in an easy-to-read table. For example, the deliverable looks at how the event achieved its goals, the number of people who followed up on their pledges, the number of participants who were SOV commuters beforehand, and the number who were continuing HOV behavior. None of these measures, however, are portrayed as criteria that benchmark how success could be determined. The deliverable’s “Executive Summary” and “Summary and Recommendations” sections do not mention effectiveness criteria nor draw conclusions about effectiveness. (As a result of the RSW participant survey, the program subsequently decided not to continue the rideshare week promotion. This outcome would be surprising to someone reading the deliverable.)

The deliverable does meet the second two purposes stated by the work plan task description. It lists opportunities for improving program effectiveness in its Summary and Recommendations section. The deliverable would benefit if these recommendations were more clearly presented as bullet points and then called out in the Executive Summary as action steps for future event preparation.

Finally, the deliverable explores the effects of the promotion. This exploration would be more valuable if important results were presented more clearly. For example, the evaluation states that 27% of all Rideshare Week registrants tried another commute mode before October 5th, 2001. It is unclear if this means they tried another mode during Rideshare Week or that they tried it at any point in their lives before the end of Rideshare Week. It is also unclear if “another mode” means a switch from drive alone to a non-drive alone mode. The report states that 65% of registrants were already using HOV modes when

they registered for the event, so it is unclear if the 27% includes regular alternative mode users who perhaps switched to driving that week.

Database Monitoring Reports

According to the RRP Work Plan, the intended purpose of the database monitoring series is to evaluate the effectiveness of the ridematching database at matching clients based on its size, composition and client motivation. The database monitoring studies analyze these relationships. The monitoring reports are more sophisticated than what was observed at the peer agencies reviewed as part of this audit. In fact, many peers cited RIDES work in this area as beneficial to their agencies.

The Database Monitoring Reports, however, could be of much greater benefit to their readers and to those making decisions about the future of the Regional Rideshare Program if key pieces of information were presented in a high-level summary format for easy absorption. Such information might include:

- How the program has changed or should change its work plan as a result of the research results
- How the program has changed or should change its monitoring activities as a result of the research results

The information has the potential to be powerful, yet it falls just short of drawing conclusions on effectiveness. For example, providing carpool information to BART riders in advance of a potential BART strike is considered a valuable RRP service. The database monitoring series has shown that this service impacts the longer-term quality of the database as future carpool seekers call people who are BART riders who are not interested in carpooling. It also shifts resource allocation from forming on-going placements to maintenance placements (shifting from one HOV mode to another). In this case, the database series could have been used to make recommendations about how to deal with emergency requests in the future – e.g. segregating these requests, purging them immediately, or asking these requestors about their purge preferences.

The research could provide program advocates with a synopsis of key accomplishments and could provide summary statistics needed to promote the program. Key findings, emerging trends and key conclusions are not called out and it is difficult to discern how all the data could help plan future program direction.

Electronic TDM Survey Instrument

The RRP Scope of Work and Work Plan state that the RRP should develop, market, and administer an electronic transportation survey questionnaire for employers. It requires the “electronic survey instrument” as the deliverable.

The deliverable entitled “Electronic Survey Instrument” shows the questionnaire that was developed. It further reports the results from an employee transportation survey conducted using RIDES’ web-based survey instrument. The report presents the results from the survey in a well-organized, clear manner and provides information to the employer about how the data could be used to help reduce vehicle trips. The work plan does not state whether the deliverable should have reported on the efforts to market the survey or the number of surveys administered.

Event Screening Memo

The Event Screening Memo is a brief memo stating the criteria that allow RIDES to determine when they will participate in an employer’s on-site event. The memo defines the criteria that make an event successful and explains the relationship between the criteria and events. The memo is easy to read and comprehensive. There are no requirements listed for this deliverable in the work plan or scope of work.

Meeting Minutes from TDM Network Meeting

This deliverable is a compilation of the meeting minutes from the TDM Network Meeting. Since the reviewer was not present at the network meeting, there is no way to determine if the minutes are comprehensive. The topics covered in the memo are fully explained and include useful information. The notes are well organized and easy to understand. There are no requirements listed for this deliverable in the work plan or scope of work.

New Ideas Recommendations Memo

The FY02 RRP Scope of Work states that the RRP should “(i)mplement a process for surfacing new ideas about potential program services and bringing them forward for consideration by MTC or the funding partners, depending on the scope of the ideas.” The Work Plan elaborates by saying:

Implement a process for identifying and developing new ideas about potential program services. The target audience for the service, approximate staff or other resources, measures of effectiveness and anticipated benefit of implementing the new idea shall be considered as part of the process. Ideas shall be brought to MTC or the funding partners for consideration depending on the scope of the ideas. Recommendations that require additional funding should identify tradeoffs where less effective services could potentially be eliminated.

The RRP deliverable is entitled “A Process for Introducing New Ideas” and defines the process by which ideas will be considered and brought to MTC. The deliverable, however, did not “implement the process” as required by the scope and work plan. It does not identify nor develop new ideas and does not address target audiences, resources needed,

measures of effectiveness, anticipated benefit or tradeoffs. It takes the first step by outlining the process, but then does not follow through with implementation.

Regional Incentives Recommendations Memo

The FY02 RRP Scope of Work and Work Plan state that the RRP should conduct research regarding regional incentive programs to encourage carpooling, vanpooling or transit. It should conceptualize, develop and evaluate different incentive opportunities and establish the framework for comparing the benefits with existing services. The RRP should recommend incentive programs that would increase the effectiveness of the Regional Rideshare Program.

The “Regional Incentives Recommendations Memo” says that its purpose “...is to look at a range of incentive programs that could encourage the use of commute alternatives among Bay Area commuters.” It omits the remainder of the deliverable’s purpose as defined by the work plan: to “conceptualize, develop and evaluate different incentive opportunities and establish the framework for comparing the benefits with existing services.”

The deliverable inventories several incentive programs; explaining what they are and where they have been implemented. It does not evaluate, compare or recommend programs. The memo concludes that some programs appear more promising than others for regional implementation, but it is not clear how programs were eliminated from consideration. Topics not included in the deliverable are:

- Evaluation criteria
- A framework for comparing the programs
- Development plans for any programs
- A presentation of the need (or lack of need) for new incentives in the Bay Area’s program to put the evaluation criteria in context
- Assessment of program feasibility
- Review of the markets that could be targeted or served by the program
- Relationship of the programs to RRP goals
- Cost assessment
- Barriers assessment (e.g. how local programs might preclude the implementation of regional incentives)
- Impact assessment

Ridematch System Evaluation Report

The work plan states that purpose of this deliverable is to:

- Recommend a single vendor's product for procurement and provide justification for recommendation.
- Explain the screening and evaluation criteria used to compare the various products;
- Describe the basic functionality and features of each of the products relative to each of the evaluation criteria; and
- Compare the various products against one another based on the findings.

The Ridematch System Evaluation report reviews two possible software programs that could be used for a new on-line ridematching system. The report concludes that eCommuter best addresses the program's needs. The reasons for and criteria used to draw this conclusion are explained in the text of the deliverable. The deliverable compares the products and their functionality relative to the evaluation criteria. The intended purpose of this deliverable is met.

One criticism of this deliverable is that the evaluation table presented in the document leads one to conclude that the *other* software program would have been chosen. The evaluation table, which is the most easily readable part of the document, summarizes the criteria by which the software programs were evaluated. It does not include two of the more important criteria, however, and the summary table appears to contradict the recommendation. The deliverables will be more useful and readily accepted by broader audiences if they present key pieces of information in summary tables or charts that "tell the story" at a glance.

Regional Rideshare Program Performance Audit

Final Report

METROPOLITAN TRANSPORTATION COMMISSION

Figure 7-1 Deliverables by Evaluation Aspect

Deliverable	Comprehensive	Meets Purpose as Stated in RRP SOW or Work Plan	Presentation	Recommendations or Conclusions
California Rideshare Week 2001 Participant Survey Report	Yes, other than lack of conclusions	Meets two of three stated purposes. It does not meet the purpose of concluding if promotion was effective.	Would benefit from tabular summaries of data, evaluation criteria, etc. Presentation of some important facts is confusing.	Lacks conclusions or recommendations
Database Monitoring Report	Yes	Yes	Tables are comprehensive, but not self explanatory and difficult to understand	Findings are summarized, but they are not interpreted to explain their significance to the program direction. There are no conclusions about what is effective and what is not.
Electronic TDM Survey Instrument	Yes	N/A	Tables are effective	N/A
Event Screening Criterion Memo	Yes	N/A	Key elements are bulleted or bolded and easy to read	Conclusions (i.e. the screening questions) are clearly called out
Meeting Minutes from TDM Network Group	Yes	N/A	OK	N/A
New Ideas Recommendations Memo	No	No	OK	As a process memo, this is N/A. As a recommendations memo, no conclusions are formed.
Regional Incentives Recommendations Memo	No	No	OK	Not all conclusions are clearly supported by document
Ridematch System Evaluation Report	Yes	Yes	Comparison table of options does not support the ultimate conclusion, since some criteria are omitted	Conclusions are well drawn and supported, yet comparison table of options creates confusion about why conclusion is reached

Chapter 8. Issues Summary

1. Introduction

Chapter 8 is an overview of the principal issues and key findings provided in the previous seven chapters. The chapter summarizes the different perspectives of the many people consulted for this audit and organizes them by topic. The issues summarized here provide context for the recommendations made in Chapter 9 of this report.

2. The Regional Rideshare Program Contract

The Regional Rideshare Program (RRP) is provided to the Bay Area through a contract between the Metropolitan Transportation Commission (MTC, the contracting agency) and RIDES for Bay Area Commuters (the contractor). Some of the stakeholders interviewed for this audit questioned whether a contract was the most effective organizational structure for the RRP, suggesting, for example, that the RRP be supported regionally as an independent agency or that it be a section within MTC itself. Because this performance audit was not intended to address organizational structure, recommendations are made with the understanding that the contract nature of the Regional Rideshare Program remains in place.

Because the RRP is structured as a contract, however, it raises certain issues about how the RRP should fit in with other institutions implementing transportation programs. These issues include the competitiveness of the contract, the definition of the RRP, and the name recognition of the program. This section reviews these issues, because they are directly related to the ability of the audit's recommendations to be implemented.

Competition

In general, contracting allows competition to create a more dynamic, cost-competitive program. However, the breadth of the RRP contract limits the field of eligible bidders to perform the work. Based on the auditor's knowledge and input from stakeholders, there is not a cadre of firms that have the infrastructure and staffing ready to step in and perform the multiple functions of the RRP as it exists today – e.g., familiarity with Bay Area transit information, vanpool formation, Commuter Check marketing, employer assistance, organizing regional events, and staffing ridematching services. Although a new contractor may be able to hire and train the needed personnel, the region would likely face an extended transition period before a comparable level of service delivery could be achieved. Therefore, the existence of a contract has not been able to effectively create much competition.

In comparison, at South Florida Commuter Services a private consultant won the contract from the previous operator. South Florida's program, however, is much smaller and more

focused in its functions than the Bay Area's, with less than half the budget and one-fourth the staffing.

Definition of the Regional Rideshare Program

The Regional Rideshare Program and RIDES are not synonymous. Some stakeholders feel that this causes confusion on the part of the public and other transportation agencies. Specifically, people question whether the Regional Rideshare Program is – by definition – just those elements included in the contract with RIDES, or whether the program is a broader effort that includes other programs aimed at reducing vehicle trips, such as TravInfo, 817-1717 and other regional marketing efforts. Several stakeholders expressed frustration by the things that RIDES does not do; not recognizing that these elements are outside the scope of the RIDES contract.

In addition, RIDES has expressed concern about its ability to define itself as an independent contracting agency, since the Regional Rideshare Program contract represents about 90% of the contractor's function. RRP funders, however, have expressed opposing concerns about the amount of resources RIDES spends to develop outside contracts or funding sources.

Name Recognition

The contract agreement also raises issues of name recognition and branding of the Regional Rideshare Program, since it is possible that RIDES will not always be the contractor. Thus, there is little point to increase the name recognition of RIDES. Several employers, some funding partners and other stakeholders, however, feel that the name "RIDES" should be the name associated with a "one-stop-shop" for all information on alternative transportation. They believe that "RIDES" should be a household name.

Other funding partners and stakeholders support the "one-stop-shop", but disagree that it should be associated with the name "RIDES," even though "RIDES" already has some name recognition within the region, especially among employers. Furthermore, RIDES does not want its name usurped, and other Bay Area mobility service providers do not want to be known as RIDES.

The lack of one alternative transportation identity creates challenges for all transportation interests:

- **RIDES**
 - which has an increasingly difficult time making travelers aware of who they are and what they do
 - which receives criticism from some funding partners, employers and TDM agencies for not doing an effective job raising public awareness.
- **Local Programs**, which each struggle to raise awareness of their transportation programs

- **Travelers**, who do not know where to go for information
- **Employers**, who want their efforts matched by more general public awareness of mobility choices
- **Transit agencies**, that do not have the resources to help people wanting regional transit information
- **MTC**, and the region, for which there is no one catch phrase by which to sum up “regional mobility efforts”

3. Work Plan Development

The Regional Rideshare Program work plan outlines the action steps for the coming year. As there is no separate document that describes the program’s goals and objectives, the work plan essentially provides the direction for the program and embodies the goals and objectives.

Development of the work plan is a collaborative effort between RIDES, MTC, and the funding partners. RIDES and MTC annually assess the performance of work activities in the current work plan to determine what should be scaled back, enhanced or omitted in the new work plan. Funding Partners are then asked to provide input in the development of new work tasks and/or the exclusion of others. Their input and direction is then incorporated and the recommended work plan is made available for their approval.

Despite this collaborative process, many parties involved have expressed frustration. MTC has concentrated its efforts on cost-sharing agreements to fund the program and has not been able to focus on providing strategic direction to the RRP. MTC relies on RIDES to initiate program direction, and believes that RIDES, as the implementing agency, is in a better position to be aware of the most current trends in alternative modes. MTC staff, however, expressed concern that RIDES has not been proactive in providing the needed strategic direction for the RRP. On the other hand, staff discussions at RIDES revealed that they believe it is the contract manager and funders’ responsibility to provide program direction, and that the contractor’s responsibility is to respond to this direction.

Some funding partners expressed frustration about what is in the work plan, and did not feel that they had adequate time to provide input. Others recognized that they could not prioritize work plan development among their competing demands. Some funding partners feel that the RRP should sit down with each county and develop a plan targeting services appropriate for that county. Others feel that the services should be designed to be leveraged cost-effectively across the Bay Area.

Finally, individual employers and members of the Regional TDM Networking Group indicated that they would welcome the opportunity to provide advice on the development of services used by employers. On the other hand, MTC has pointed out that it would be difficult to include employers in this process.

The following summarizes the issues of the situation:

- Stakeholders are confused about what agency(ies) controls the direction of the Regional Rideshare Program,
- Funding partners and MTC are concerned that RIDES does not do “more” or is not “more responsive” to changing needs,
- Funding partners and MTC are dissatisfied by the Regional Rideshare Program work plan,
- Some funding partners want service customized to their county’s needs, and
- Employers want more opportunity to provide input on employer services.

4. Strategic Planning

As discussed in the previous section, there is not currently a uniform vision documented in the contract or work plan for the Regional Rideshare Program. This creates several additional issues:

- The Regional Rideshare Program has not been aggressive in responding to changes in the political, economic, demographic, technological and regulatory environment in the Bay Area. For example, the program has not taken sufficient steps to address the increase in locally provided services, city-driven trip reduction efforts, or employer needs for more robust services. While the details within the work plan may change, the overall structure of the plan is rigid.
- MTC has expressed great concern over the program’s inability to develop new ideas for program elements, events or outreach. MTC sees these new ideas as creating strategic direction. It follows, however, that a regionally established strategic direction would be the catalyst for the development of new ideas, rather than vice versa.
- The lack of strategic direction also has allowed some tasks to be added to the Regional Rideshare Program that are not as relevant to the program’s core mission¹.

Outside the scope of the contract, RIDES develops a strategic plan with its board of directors every three years. While a representative from MTC is on the RIDES’ board, the RIDES strategic plan is not the Regional Rideshare Program strategic plan. It is a challenge for RIDES to achieve a strategic direction independent of the Regional Rideshare Program contract, as long as the contract represents 90% of its budget. RIDES’ strategic plan includes several regional initiatives that expand its role beyond the RRP contract, and are intended to build RIDES as an independent contractor. Some stakeholders feel that the contractor, the funders and the contract manager should jointly establish a strategy for the value added services that the contractor would pursue outside the scope of the RRP contract. They feel it

¹ See activities defined as Special Service functions in Figure 9-6.

is important to jointly identify boundaries to minimize possible overlap or conflicting messages about what the contractor does within the scope of the RRP contract and outside its scope.

5. Relationship to Local Programs

Local programs in the counties have become more active in providing Transportation Demand Management (TDM) programs since the passage of Proposition 111 in 1990, and passage of half-cent transportation sales taxes in five of the nine Bay Area counties. While local jurisdictions form their own programs to offer more services than are offered regionally, many stakeholders are concerned that the boundaries between the regional and local programs are blurred and that the role that each agency plays is not articulated well enough to avoid confusing the public.

There is no vision for how the Regional Rideshare Program should relate to local efforts or how partnerships between the local and regional agencies should be developed. RIDES believes that MTC should provide more direction for how different trip-reduction program components could fit together so that services can be provided efficiently and seamlessly within the region. As contract administrator, MTC looks to RIDES for input and content on how to resolve these issues. Although counties say they feel caught in the middle between MTC and RIDES, they also share responsibility for creating the duplication of efforts, since their programs were built after the RRP had been in existence for many years.

Funding Partners acknowledged that each program is protective of the mode shift for which it can take credit, since the credit forms the basis for continued funding, and, therefore, each program has a vested interest to build its own identity within the Bay Area. At the same time, there is regional frustration that the name recognition of RIDES, as well as other transportation information outlets, is declining. There is also regional frustration that a “one-stop-shop” for transportation information does not exist within the Bay Area. There are, however, inherent contradictions in the desires to create a single message and identity for alternative transportation, increase RIDES’ name recognition, and build brand awareness of individual programs. Finally, counties with local programs are concerned that they receive proportionally less service from the RPP than counties that do not have their own local programs.

It is expected that local programs will continue to grow and that the need for the regional program to partner with local programs will become increasingly more important. Some county representatives feel that the RRP should sit down with each county and develop a plan targeting services appropriate for that county. The point of having a regional program, however, is to develop services that can be leveraged regionally, thereby building economies of scale.

Despite the concerns about overlap and name competition, there is more than enough work to do to promote transportation alternatives. In addition, most employers interviewed do not consider that RIDES' services overlap with other agencies.

6. Program Focus

An important issue is whether the Regional Rideshare Program should focus on all trips or just commute trips and how this then relates to the program's goals, objectives and work plan. The work plan and program goal do not specify the focus, and RIDES staff did not feel their program had a clearly defined customer focus since people can request information for all purposes. Stakeholders, RIDES and MTC all support more explicitly expanding the program focus to include non-commute trips, especially trips to school and recreational events.

Stakeholders and employers also agree that ridematching is the most important service offered by the program but that the program should focus on more than carpool and vanpool formation. This will be important to allow the program focus to expand beyond commute trips, as carpooling and vanpooling are less applicable for many non-commute travel purposes.²

Expanding the focus beyond commute trips and expanding the focus beyond carpool and vanpool trips has implications for program monitoring that must be accepted. First of all, some stakeholders have already expressed concern about non-matchlist clients. Program activity dedicated to non-matchlist clients will increase as the focus shifts beyond carpool and vanpool trips. In addition, focusing on non-commute trips will increase the number of one-time placements and will also often shift carpools (i.e., families traveling together) to other non-vehicular modes.

Another issue identified by some funding partners is that none of the tasks in the Work Plan are identified as having a higher priority than other tasks. Some stakeholders also feel that the program is stretched too thin. At the same time, many believe that all the elements in the program are highly important.

7. Monitoring & Evaluation

Many issues were identified relating to program monitoring and evaluation. They are organized here by topic.

Outcomes-Based Measurements

All stakeholders are concerned that the regional rideshare program does not measure, or effectively communicate the value that the program adds to the region. The audit found that

² For example, it will be more difficult to form carpools among strangers to the airport, to sporting events, and other non-regular trips.

the number of placements into alternative modes and the vehicle trips reduced by the program are the two measures of most interest to funding partners. RIDES collects this information but does not summarize or present it in a readily-accessible format.

Activity-Based Measurements

The program contract has focused on using activity-based measurements to understand the effectiveness of specific program activities, such as events. The existing activity-based measurements, however, are not successful at drawing conclusions about the effectiveness of the activities.

Context of Outcomes

The lack of industry benchmarks makes it very difficult to conclusively determine program element effectiveness, and comparisons to peer data have limited usefulness and are not recommended as benchmarks. As a result, some funding partners feel that there is no context to the objectives in the Work Plan and people question whether they are too high or too low. Cost per output, trend data, and daily vehicle trip reduction, however, could be better used to explain program results.

Rigor of Methodology

Stakeholders have doubts about the validity of the results reported by the Regional Rideshare Program. The audit found the majority of the evaluation methodologies sound, but found that the reporting of Vehicle Trip Reduction and Placements is not well presented and, as a result, is misleading.

Understanding Placements

Stakeholders question the number of people placed into alternative modes documented by the RRP, because they know that the program takes credit for mode shifts that are not from single-occupant vehicles. The audit found this methodology to be industry practice, in that efforts to support people's ability to continue using HOV modes should be credited. (These are called "maintenance placements.")

However, the RRP's annual results are strongly influenced by these maintenance placements, and the reporting does not adequately explain these details. For example, in FY 02, half of all ridematch requests were generated from Rideshare Week (RSW). At the same time, the evaluation of Rideshare Week found that 65% of participants were already using alternative modes. Therefore, a majority of placements from RSW are "maintenance placements." The combined effect of RSW's influence on the database with the nature of these entrants makes one wonder how much influence the Regional Rideshare Program is having on mode shift and how valuable knowing the number of placements really is.

In addition, one-day trial placements from Bike to Work Day represented 48% of the estimated annual placements in FY 02. These placements have not yet been supported by enough research to know how they are sustaining or creating mode shift. (While BTWD placements dramatically raise the number of annual placements, they do not inflate vehicle trip reduction or vehicle miles traveled reductions, since the majority of the placements are counted as one-day placements.)

Finally, stakeholders are concerned that RIDES takes credit for (counts as placements) people who call for transit information, even though little assistance is actually provided to cause these shifts. Those requesting transit information end up in RIDES' separate "non-matchlist" database if they are mailed information. Also included in this non-matchlist database are people who are mailed "How To" brochures, Park & Ride lot maps, Commute Profile reports, or other commute related materials. In FY02, non-matchlist clients represented 20% of the placements made. RIDES' data does not currently identify placements from different sources, and there is no identified threshold of information or assistance that a person must receive in order to be included in the non-matchlist database.

Impact of Vanpooling Efforts

Funding partners moreover question how vanpool formation is counted and are concerned about double-counting vanpools. The cost of forming vanpools is not documented, and many perceive that the RRP takes credit for vanpools that are formed through the effort of the van vendors or local outreach.

VMT and Vehicle Trip Reduction

Several funding partners would like the RRP to use the Air District's criteria for calculating VMT and vehicle trip reduction. As with many evaluation strategies, several assumptions are inherent in the air district formula. A few stakeholders disagree that the air district calculations for VMT and vehicle trip reduction are meaningful, given these assumptions. Complicating the issue, RIDES uses the entire Air District formula when reporting results to the Air District, but does not use the entire formula when reporting results to funding partners and MTC.³ Using these two different strategies for reporting these statistics creates confusion and doubt about what is being conveyed.

Other Evaluation Issues

Some additional monitoring and evaluation issues are:

- For all the reporting that the program provides, it is not easy to discern whether program targets are being met.

³ In the air district formula, VMT and vehicle trip reductions are off-set by A) the vehicle miles and vehicle trips made to access the carpool or vanpool, and B) the vehicle trips and vehicle miles generated by the pool vehicle that remains on the road. In the monthly summary reports, however, the two off-sets are not included. Thus, the monthly summary reports present gross reductions, while the air district formula presents net reductions.

- The program did not meet the majority of its targets in FY02.
- There is no measurement of “customer satisfaction”, a measure that many funding partners are keenly interested in, and
- Some counties want county-by-county breakdowns of the number of matches made. This data is not available, but the audit questions the value of providing such data.

8. Databases

RIDES has speculated that a smaller matchlist database may lead to a lower placement rate. Additional database monitoring has led to less conclusive evidence of this, indicating that both quality and quantity of the database are critical to creating matches. Quality of the database is of great concern to many funding partners and employers, even though RIDES’ purge cycle of five months is more aggressive than any of the peers contacted. There are no scope-of-work performance established targets related to the quality of the database, although RIDES sets internal targets for the number of names per matchlist.

The audit also found significant concerns with the quality of RIDES’ Marketing Database, in terms of the accuracy and completeness of the information, and the frequency with which it is updated. RIDES is not meeting its target to have 5,000 active employers in the database, even though there are more than 5,000 entries.

9. Marketing

Most employers interviewed and a number of funding partners would like to see more general public marketing, such as advertising and billboards. On the other hand, some funding partners believe that general public marketing is too expensive and not a proven strategy. RIDES is like the peer agencies in that they all focus their outreach and marketing efforts on employers, although little research has been conducted to determine the effectiveness of employer outreach. The general consensus is that agencies do not have enough funding to do general public marketing and major employers provide a large audience for the amount of effort needed to conduct outreach.

Three of the four peers, however, have conducted some general public marketing. MetroPool has the strongest emphasis on general public marketing, using direct mail advertising and media buys to reach a broad audience. South Florida Commuter Services has used mass media, such as the local business journal and PBS to inform employers about tax benefit programs. The South Florida program also advertised its Guaranteed Ride Home (GRH) program to the general public through Spanish television. Commuter Connections in Washington D.C. has also used general public marketing in its GRH work element. In Southern California, the counties supporting Southern California Rideshare decided not to fund general public marketing, and agency staff have cited this as a weakness of their program. In all cases, the peers have not studied nor drawn qualitative conclusions about the effectiveness of general public marketing or employer marketing.

Other issues related to marketing include a need to develop regional materials that can be downloaded and customized by local agencies or employers. In addition, many stakeholders want RIDES to market to specific highway corridors, but at the same time, each county wants to ensure that its area is receiving equal service from the regional program.

10. Deliverables

There was general agreement from Funding Partners that the Commute Profile is useful and should be continued, although a few thought that it looked too glossy and expensive. MTC, however, has concerns about Commute Profile and feels that it should better explain the methodology behind the findings and better probe the reasons behind the trend analysis.

There has been miscommunication and misinterpretation between RIDES and MTC on the content and purpose of deliverables new to the work plan. New deliverables intended to serve as “studies” on the effectiveness of specific program elements or program development need to make recommendations or draw conclusions about what the findings mean for program development or the significance of the finding to program activities. There is a conflict of interest in having RIDES write these deliverables, because any recommendations will impact RIDES’ work plan.

11. Events

The two key issues associated with regional events identified by stakeholders and employers are that they are stagnant, and that they measure their success by indicators like the number of participants instead of the impact on mode shift. By stagnant, those interviewed felt that the promotions were the same each year, offered little excitement to the public, and attracted the same audiences each year. Given the large contributions that events make to the regional rideshare program, their effectiveness on long-term mode shift must be better understood than it is.

12. Employer Outreach

RIDES’ services are highly valued by employers – particularly information on commute alternatives. Employers have good knowledge of the basic services that RIDES offers, in terms of ridematching and carpool formation. Many, however, are unaware that RIDES can provide on-site consultations, exclusive ridematching, or other specialized employer services.

Among the small sample of employers interviewed, wide variations are apparent in employers’ experiences with RIDES. At one extreme, more than one employer views RIDES as largely irrelevant, while others cannot praise the organization and its staff highly enough. Similarly employer surveys found that some employers benefit from a large amount of assistance with on-site events and other programs, while others are unaware that RIDES

even offers these services. Supporting this issue of unequal employer service, some funding partners feel that the Account Representatives are not held accountable for the level of awareness or activity in their territories or the quality of service they provide their employers.

Different sized employers have different needs; as do employers with different levels of internal TDM staff support. Most employers interviewed would like to see expanded and/or additional regional rideshare services, particularly more on-site consultations and assistance, networking and training events. Some funding partners would also like to see more resources devoted to helping employers develop trip reduction plans.

13. Ridematching

Employers interviewed see ridematching as the most important service for RIDES to offer, even though many are dissatisfied with the current service. Three of the five employers interviewed were extremely critical of the ridematching and all five had little sense of the number of matches produced for their employees. Employer complaints included:

- Too few names per matchlist
- Out-of-date names on matchlists
- Irrelevant matches (e.g. ones that would involve a long detour to pick someone up)
- Inaccurate information on pick-up and drop-off points
- Long turnaround times to produce matchlists

Several employers want their employees to be able to request matches only from a database of that company's employees. While RIDES offers this service, many are unaware of it. Thus many employers do their own ridematching in house, and view RIDES as a last resort.

Respondents to the employer e-mail survey, in contrast, were less likely to see ridematching as the most important RIDES service. While just 12% of respondents cited ridematching as "not useful", this was the highest proportion for any of the specific services asked about. While most employers surveyed cited having little knowledge of the quality of ridematching services, those that do believe that ridematch lists are accurate, are provided quickly and efficiently and have sufficient names, but that few employees have found carpool partners through this route.

Online Ridematching

Employers have high expectations for online ridematching, which will be important for RIDES to live up to from the start. Knowing how to change the program focus or ridematching support functions based on the introduction of the on-line Ridematching system is of concern. Online, real-time ridematching will:

- free up staff resources from data entry,
- prioritize marketing efforts towards directing people to the website,
- create a greater opportunity for general public marketing,
- create more opportunities for non-commute trip matching, and
- make it easier to build separate databases for individual employers, or special projects (e.g., school pool).

14. Vanpooling

Employers commented that RIDES helped them fill vanpool seats particularly by providing information on vans with empty seats to employers. On the other hand, employers stated that the poor quality of the ridematching database is a major restraint to effective vanpool formation. Employer interviews revealed that vanpooling is an area where the RRP could be more useful than it is now. Furthermore, vanpool operators such as VPSI and Enterprise are considered to be helpful in filling seats in vanpools, and craigslist.org was also mentioned as a useful source.

Of the employers surveyed, 55% said vanpool services were not useful or had never used them/did not know about them. This is seemingly alarming given the focus of the RRP on vanpools. Vanpool services, however, vary in applicability by employer characteristic. Among employers with more than 500 employees, 62% ranked vanpool services as very or somewhat useful, and among employers with robust TDM programs, vanpool services ranked just as useful as other services.

Many funding partners question what RIDES does in order to take credit for vanpool formation. Furthermore, with three vanpool consultants, one specialist, one manager, and part of an administrative assistant dedicated to vanpool formation, funding partners are discouraged that just 1% of the commuting population vanpools.

Chapter 9. Recommendations

This chapter describes the audit recommendations. The recommendations are organized into four general categories:

- Strategic,
- Contract Management,
- Performance Monitoring, and
- Implementation Plan Elements

The recommendations in this chapter have been derived from the analysis presented in previous chapters of this report. This includes a peer review of other rideshare agencies, an employer survey, analysis of RIDES' deliverables and evaluation documents, and interviews with funding partners, RIDES Board members and staff, MTC staff and employer TDM coordinators. The analysis of the input from the various sources is summarized in Chapter 8.

The course of the input process yielded several recommendations. The audit team developed other recommendations by synthesizing the various input received. Discussions with MTC staff helped to further refine the recommendations.

The recommendations will be further refined through the development and implementation of the "Strategic Plan to Implement the Regional Rideshare Program Audit Recommendations," a subsequent document to this audit. Appendix J includes all Funding Partner and RIDES' comments on the audit recommendations. This chapter provides footnotes to refer the reader to comments in Appendix J related to the recommendation.

Strategic Recommendations

Strategic recommendations focus on the direction and definition of the Regional Rideshare Program (RRP).

Program Identity

MTC has adopted the national 511 phone number, which was granted for traveler information by the Federal Communications Commission in July 2002, as a transportation information resource in the Bay Area. MTC is developing the 511.org web portal, which will serve as the Internet gateway to transportation information.

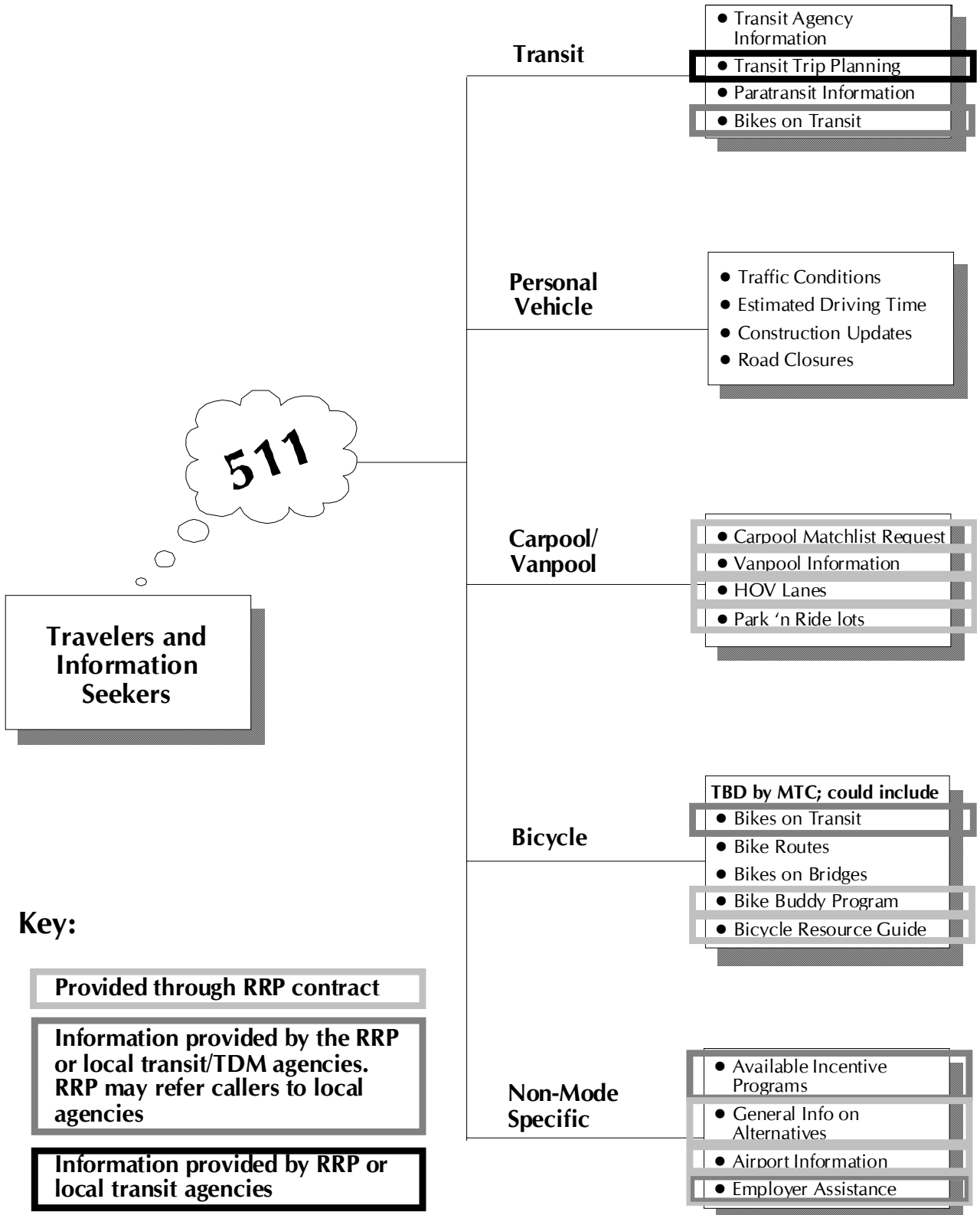
The audit clearly found a need for a single transportation information identity in the Bay Area and recommends that 511 should become the *sole* identity for transportation information, including the RRP. "511" should be the "one-stop-shop" for transportation information, including phone, website and promotional marketing information. Regardless

of the type of transportation information being sought, a traveler should know that he/she can go to "511" and be able to get from point A to point B, regardless of the person's pre-existing transportation knowledge. As such, the Regional Rideshare Program contract (as well as local programs promoting transportation demand management) should all be identified under the 511 umbrella. The Regional Rideshare Program contract functions should migrate from www.RIDES.org to the 511 web site and the program's phone number and other identifiers should transition to 511. One name must be identified for the one-stop-shop and used consistently by the Regional Rideshare Program. The new on-line ridematching service should also be identified under the 511 services umbrella and not under the name of the contractor.

Creating a seamless rideshare program under 511 will not be effective unless the concept is developed by regional consensus and is cooperatively supported by local Transportation Demand Management efforts.

Figure 9-1 shows how this structure would function.

Figure 9-1 One-Stop-Shop Information Organization



Establish a Technical Advisory Committee¹

The Regional Rideshare Program (RRP) needs a Technical Advisory Committee (TAC) to define its role and strategic direction in context with the other Bay Area agencies that provide alternative transportation services and information.

As several stakeholders suggested, the TAC should be a committee sponsored by MTC. As MTC suggested, the TAC could provide semi-annual status updates to the Bay Area Partnership. The Bay Area Partnership is comprised of 32 agencies responsible for moving people and goods in the San Francisco Bay Area. Presenting to the Bay Area Partnership will inform other agency directors about the Regional Rideshare Program's activities, with the intent of raising awareness about the RRP and allowing different agencies to understand the connections between the RRP and the region's transportation strategy. As with all MTC Technical Advisory Committees, the RRP TAC would be an advisory body to MTC.

Currently, RIDES staffs the Regional TDM Networking Group, consisting of employers and agencies involved in transportation alternatives. While the Networking Group now discusses many issues related to the RRP Implementation Plan, no defined process exists to move the group's discussions and ideas for change into action. The recommended TAC would establish a formalized channel through which funding partners and TDM practitioners can provide their advice on decisions affecting the RRP. As such, TAC membership should include members of both of these groups.

TAC membership should be kept to a reasonable size and provide advice to MTC through consensus. Membership should also be geographically balanced to represent all the counties served by the RRP. Finally, members should have proven and applied experience in regional TDM (or local TDM that coordinates with regional efforts), should represent an agency or recognized organization, and should understand and/or represent a regional perspective on mobility management.

Create a "Strategic Direction" Task Within the Regional Rideshare Program Work Plan²

The Regional Rideshare Program contract should include a specific task element for providing necessary input into the program's strategic direction. This element would include participation in regional strategic planning efforts (e.g. through the TAC), the development of new or revised program elements to achieve the program's strategic direction, gathering data to support strategic decision making, and preparing contractor recommendations for the program's strategic direction.

¹ See comments in Appendix J provided by VTA, Alameda County CMA and BAAQMD.

² See comment in Appendix J provided by VTA.

Confirm & Establish New Rideshare Program Goals

The audit recommends goals and objectives for the RRP, but it is further recommended that these be endorsed by, and – in future years – be established by the TAC. The contractor and the Implementation Plan should fulfill the goals and objectives set by the TAC (similar to a transit board contracting with an operator to run the transit service). The Implementation Plan should change or re-prioritize its tasks as the program's objectives evolve.

Program Goal

The recommended goal is simply an elaboration of the program's current goal. The goal is intended to reflect the long-term desired outcome of the program and be general enough to provide consistent guidance for the program in future years.

Shift individuals from single occupant vehicles (SOVs) to carpools, vanpools, ~~and other transportation alternatives~~ transit, bicycling, walking and telecommuting and help individuals sustain this shift. *(The text edit formatting shows how this goal is an elaboration of the program's current goal).*

Program Objectives

The objectives reflect what is most important for the program to focus on in the coming year. These objectives may be revised in subsequent years as the needs of the program change.

- 1) Provide service to different traveler markets based on program priorities and resources.
- 2) Establish partnerships between regional efforts and local efforts so that the "Regional Rideshare Program" is seamlessly included in the regional transportation information system (511) from the customer's perspective. The system will feature complementary elements, use its joint resources cooperatively, and act a one-stop-shop for regional transportation information.³
- 3) Develop and maintain current, accurate and robust ridematching databases to serve regional commute trips and support localized trip reduction during peak travel times (e.g. school pool databases and carpool-to-rail).
- 4) Provide general transportation information according to program service priorities.

³ See Appendix J for comment from BAAQMD.

Define the Service Priorities of the Regional Rideshare Program

The Regional Rideshare Program should define its service markets and prioritize them according to the program's goal and objectives. The type and level of service the RRP provides to each market should be directed by its priority level. The service priorities should also direct how to develop the elements of the work plan.

The Regional Rideshare Program should prioritize its service markets according to the following criteria:

Criteria of primary importance

- Serves trips made during times of greatest traffic congestion
- Has a high trip reduction potential
- Has a high VMT/emissions reduction potential
- The cost-effectiveness of /efficiency of /ability to produce outcomes by serving the market

Criteria of secondary importance

- Serves trips that cross county boundaries (i.e. "regional trips")
- Serves trips that occur throughout the region
- Produces on-going placements
- Is well served by RRP's unique capabilities to provide matchlists and a one-stop shop for information⁴
- Relative ease of evaluating the results of serving the market

Based on the recommended criteria, the following is the recommended service priority for the RRP. Service markets at the lower end of the priority list might be provided modest or no services depending on available resources. The higher the priority, the more services should be provided to the market, including outreach, marketing, events, and program development.

First Priority Service Markets

- Commuter Trips
- Feeder Trips to/from Transit
- Trips to/from Airports

⁴ One-stop-shop further defined as "ability to simplify decision-making for users"

Second Priority Service Markets

- General Discretionary Trips
- Student Trips
- Trips to/from Regional Attractions

Third Priority Service Markets

- Special Event Trips
- Seniors and Special Need Trips
- Welfare to Work Trips
- Construction Project Trip Services

In addition, services for Emergency Transportation Needs should be provided as needed. Emergencies might include system-wide transit shutdowns (e.g. transit operator strike) or natural disasters that impact the transportation network.

Appendix I shows the matrix used to prioritize the markets based on the criteria.

Commute Trips

Because congestion occurs during the morning and evening commute periods, the RRP should focus on the reduction of single-occupant vehicles during these times. Because commute trips are dispersed throughout the region, the Regional Rideshare Program is the best-positioned and most identifiable resource to provide information to regional commuters. Commute trips, because they are consistent and predictable, are also easier to convert to alternative modes, especially carpooling and vanpooling, than are many types of non-commute trips. For these reasons, regional commute trips should continue to be the primary focus of the Regional Rideshare Program in partnership with the local county programs.

Student and Carpool to Transit Trips⁵

These trips meet some, but not all of the identified criteria. Many localized school trip represent a large percentage of peak traffic congestion. While not regional trips, both of these markets are found throughout the region. Furthermore, the trips are consistent and predictable, therefore leading to a greater potential for sustained trip reduction. Finally, the trips are well served with carpool ridematching, a service best leveraged by the RRP, especially with the introduction of the on-line ridematching system.

Several stakeholders expressed interest in expanding the RRP to include school trips. The auditors believe that some service should be offered to this market, but that aggressive outreach to schools, on-site coordination meetings and on-site marketing conducted by the RRP staff (similar to the effort done for employer outreach) would stretch the RRP's

⁵ See comments in Appendix J provided by VTA and RIDES.

resources too thin. This market could be served by setting up individual matching databases for schools and informing schools that this capability exists. Simple marketing strategies include advertising on the 511web portal and communicating with cities to pass the information on to their local school districts

Airports and Other Regional Attractions and Special Events

Weekend and/or non-commute traffic in the Bay Area can often be as bad as traditional peak-hour traffic, supporting service to non-commute destinations. Furthermore, when the 511-phone number becomes well known, the RRP will be the logical entry point for people seeking information about non-driving options to regional non-commute destinations.

While these trips often cross regional boundaries, most of the placement activity will be trial (i.e. one-time) placements. As non-regular trips, the potential for vehicle trip and VMT reduction is less than with the higher-prioritized markets.

The TAC should help identify which, if any, regional attractions or special events should be served, and to what level. Otherwise, the resources necessary to provide specialized information for these markets could overwhelm available program resources. For example, RIDES (outside the RRP contract) currently provides informational services for transportation to Pacific Bell Park. If this service were to be absorbed in the RRP contract, one could argue that such services should also be provided to people traveling to the Shark Tank, the Coliseum, 3-Com Park, etc. which could stretch thin the RRP's financial resources.

The audit does not recommend that specific attractions be prioritized for service in the RRP. However, it does recommend that the TAC use the following criteria to determine whether a specific regional attraction should be supported by information from the RRP:

1. The attraction is regional in nature.
2. It expects a specified threshold of daily trips.
3. The destination does not provide free parking.⁶
4. The destination is a consistent⁷ trip attractor.

The three regional airports are examples that would best meet such established criteria while one-time special events would meet the criteria to a lesser extent.

The Implementation Plan should examine how an expanded focus on regional non-commute trips can be accommodated within the resources available, while continuing to

⁶ Families make many non-commute trips, and there is an economy-of-scale to driving. It is more difficult to shift a family carpool to a non-automobile mode given the price of transit tickets for the group, or the difficulty of taking children by bicycle or walking. As such, there needs to be an economic disadvantage to driving, in the form of parking charges, to make this effort worthwhile. This also means that the majority of non-commute-trip informational services would be targeted at activities taking place in San Francisco.

⁷ Annual regional events may be given lower priority using this criterion depending on where the event is located.

target commute trips as the primary RRP focus. (This recommendation has program-monitoring impacts which are discussed in a subsequent section of this chapter.)

Allow Employer Outreach & Assistance Funding and Responsibilities to Pass Through to Counties

Given the recommendation to continue to prioritize commute trip service, employer services should remain an important component of regional TDM efforts. These efforts, however, should be better coordinated with local programs. While the audit found that RIDES' services, particularly information about commute alternatives, are highly valued by employers, it also found that stakeholders see a difference in service quality by county, a lack of coordination with local programs, and a need for more awareness about specialized employer services available by county.

As such, the audit recommends that counties be given the option to take responsibility for employer outreach and services within its jurisdiction. Counties electing this option would be required to provide a work scope and program goals related to this component. Funding that typically went to the regional program to support account representative activities, and the responsibilities associated with the funding, would pass to the local level. Account representative activities traditionally provided by RIDES would no longer be offered to those counties electing to provide this function locally.

Further recommendations regarding employer outreach and services, and the division of functions between local jurisdictions and the regional program, are made in the "Implementation Plan Reorganization" recommendations section.

Contract Management

Reorganize the Implementation Plan by Function⁸

To facilitate several of the recommendations made by this audit, and to create an implementation plan that is easier to track and understand, the Implementation Plan should be restructured by function. Figure 9-2 describes a recommended organization of the Implementation Plan, puts the Implementation Plan elements in order of priority, and breaks items down between core service delivery functions, support functions and special delivery functions.

⁸ See comment in Appendix J provided by VTA.

Figure 9-2 Recommended Implementation Plan Organization

	Program Element	How Billed	Specific Tasks (non-inclusive)
Core Service Delivery Functions	Regional Transportation Information Broker	Time & Materials	Telephone Services, including Airport Information Support 511 services
	Ridematching	Time & Materials	Provide Matchlist Services ⁹ Updating & Maintaining System Help vanpools fill seats
	Employer Outreach & Services	Time & Materials	On-Site consultations Employer database outreach Identifying new employer contacts On-site events TDM planning assistance On-line mode split survey Vanpool formation at employer sites Etc.
	Marketing	Time & Materials	Media Relations Materials Development Website
	Regional Events	Time & Materials	Promotion A Promotion B
	Pre-Tax Benefit Program	Time & Materials	Promote & Educate Employers about Pre-Tax Commuter Benefits
	Other prioritized service markets ¹⁰	Time & Materials	TBD
Support Functions	Strategic Planning	Time & Materials	Program Coordination and Communication
	Monitoring & Evaluation	Time & Materials	Quality Control and Monitoring Program
	New Program Development	Task Billed	Development phase of any new program elements
	On-Going Deliverables	Task Billed	Commute Profile Communication & Other Task Plans Etc.
	Special Studies	Task Billed	Evaluation of element effectiveness Other
	Business Development	Time & Materials	Develop outside funding sources as directed by TAC

⁹ Might include ridematching services targeted to specific service markets (see footnote 4).

¹⁰ Based on goal confirmation and service market prioritization identified by the TAC, additional markets may require their own section of the work plan. For example, if school services are strongly supported by TAC members such that services like school outreach and consulting are added to the work plan, this should be a new Implementation Plan element. If, however, services to this market are limited to on-line matching services and simple marketing, then they can be incorporated into the ridematching element of the Implementation Plan.

Special Service Delivery Functions	Special Services	Time & Materials	Maintain Regional Transportation Information Centers Maintain Transit Station Information Signs Welfare to Work services Other non-prioritized markets that obtain services in addition to ridematching
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Assess Contract Invoices and Billing¹¹

The Audit recommends assigning a specific budget to each task in the program's scope of work and requiring the contractor to invoice its services to reflect specific work activities and deliverables. This will improve monitoring of individual program elements and facilitate other recommendations made by this audit.

While some program elements should be billed on a time and materials basis (e.g. on-going ridematching operations), others should be task-billed according to MTC's standard contract arrangement, in order to ensure quality, on-time deliverables. Tasks that lend themselves to billing by task include: monitoring and evaluation reporting, new program development, preparation of on-going deliverables, and special studies functions (see Implementation Plan recommendations and Figure 9-2 for more detail).

Establish Program Incentives

The audit recommends establishing incentives within the program contract that are tied to meeting or exceeding designated program targets intended to measure the performance of the contractor. The audit recommends establishing a sliding scale of reduced contract payment if the program fails to meet identified targets for two consecutive years. The incentive goals should be related to those objectives that measure contractor effort and are less related to external economic trends (i.e. the Tier 2 objections described below).

Program Monitoring & Evaluation

Prioritize Program Measurements¹²

Prioritize, or tier, program measurements according to the following strategy:

- First tier measurements explain the "value added" of the program that can be easily understood by elected officials or other interested parties not intimately familiar with the ridesharing industry.

¹¹ See comments in Appendix J provided by VTA and RIDES.

¹² See comments in Appendix J provided by RIDES.

- Second tier measurements are designed to measure the job performance of the contractor. MTC and the funding partners should choose five to ten objectives each year on which to base contractor performance that reflect the objectives or strategic priorities in that year's Implementation Plan.
- Third tier measurements consist of data needed to derive the first tier measurements. Third tier measurements are intended for audiences who want to better understand how the first tier outcomes are calculated or are used to footnote how first tier measurements are derived.
- Fourth tier measurements are other activity-based measurements that are tracked to support program development. These measurements include possible tier 2 measurements that were not selected in that year for contract evaluation.

Figure 9-3 shows a list of the program's current evaluation measurements organized by the recommended tier structure. Figure 9-3 also explains if the measurement is an indicator of progress toward the program goal or one of the objectives. Figure 9-4 shows how often the RRP should report the measurements and their intended target audience.

Figure 9-3 Evaluation Measure Priorities¹³

Type	Measurement	Indicator of...	Measures ...
Tier 1: Measures Program Outcomes	Quarterly/YTD Placements	Impact on SOV	Goal
	Vanpools formed in quarter	Vanpool activity	Goal
	Daily Pounds of NOx reduced (or quarterly/YTD)	Impact on Air Quality	Goal
	Daily VMT reduction (or quarterly/YTD)	Impact on Mobility	Goal
	Daily Vehicle trip reduction (or quarterly/YTD)	Impact on SOV	Goal
	Cost per trip reduced	Value of Effort	Goal
	Commuters Requesting Assistance in quarter (i.e. sum of net # of matchlist + non-matchlist clients served)	Matching Activity/Public Outreach	Obj. 1 Obj. 3
	Number of active people in the ridematching database & breakdown by origin & destination county	Ability to Match / Public awareness of program	Obj. 1 Obj. 3
	Placements from Promotional Events/Event Outcomes ¹⁴	Effectiveness of events	Goal
	One-time placements from regional non-commute trip reduction efforts	Impact on Vehicle Trips	Obj. 1 Obj. 4
Tier 2: Measures Contractor Performance ¹⁵	Vanpool formation meetings	Vanpool activity	Obj. 1
	Active employers in database	Level of employer outreach	Obj. 1
	# of employer site visits	Level of employer outreach	Obj. 1
	Number of requests for regional transit & bicycle information	Transit activity	Obj. 4
	Satisfaction with RRP services	Employer, partner & client satisfaction	Obj. 1, 2, 3, 4
	# of employers using customized services (e.g. web survey and TDM plans)	Employer assistance	Obj. 1
	# of employers with links to the on-line ridematching system	Impact of on-line database	Obj. 1 Obj. 3
	Accuracy of matchlists	Customer satisfaction	Obj. 3
Tier 3: Supports the calculation of other measurements	Placement rate	Matching activity	Goal
	HOV Mode longevity	Needed to derive VMT reduction	Goal
	Details of placement (e.g. trial, on-going, or maintenance placements)	Needed to derive VMT reduction	Goal
	HOV Mode longevity and HOV mode use frequency	Needed to derive VMT reduction	Goal

¹³ Target audiences and reporting timeframes are shown in Figure 9-4.

¹⁴ These would not be reported until event occurs and is evaluated.

¹⁵ The contractor and MTC should select five to seven measures to use to monitor contractor performance depending on the work plan priorities for that year. Tier 4 measurements could also be selected.

Regional Rideshare Program Performance Audit

FINAL REPORT

METROPOLITAN TRANSPORTATION COMMISSION

Type	Measurement	Indicator of...	Measures Goal...
Tier 4: Optional Measures to Use as Tier 2 Measures or to Support Program Development	# of new active employers	Level of employer outreach	Obj. 1
	# of placement phone calls	Matching activity	Obj. 3
	# of matchlists requested by source (e.g. website)	Effectiveness of Information Channels	
	# of transit plans produced	Public awareness	Obj. 4
	# of information phone calls received	Public awareness	Obj. 2 Obj. 4
	# of on-site, staffed transportation events	Marketing effort/Level of employer contact	Obj. 1 Obj. 4
	# of event pledges, sponsors, energizer stations, etc.	Effectiveness of events	Obj. 1
	# of new materials produced each month	Level of marketing activity	Obj. 1 Obj. 2 Obj. 4
	# of commute literature pieces distributed	Public awareness	Obj. 2 Obj. 4
	# of website hits or user sessions/page views	Public awareness	Obj. 2 Obj. 4
	# of media pieces/mentions	Public awareness	Obj. 2 Obj. 4
	# of employers enrolling in a Commuter Benefit program after receiving consultation	Employer outreach impact	Obj. 1
	# of employer contacts per year	Employer outreach	Obj. 1
	# of employers setting up unique employer databases through the regional on-line system	Employer outreach impact	Obj. 1 Obj. 3
	Average size of vanpool fleet in quarter	Vanpool activity	Obj. 1

Tier 1 measures are influenced by local program efforts. For example, the Regional Rideshare Program would not have as many carpool matches if carpoolers were not encouraged by local support and incentive programs.

To this extent, Tier 1 measurements also measure achievement toward Objective #2: to establish partnerships between regional efforts and local efforts to create a “Regional Rideshare Program” that is seamless from the customer’s perspective, features complementary elements, uses its joint resources cooperatively, and is a one-stop-shop for regional transportation information.

Reorganize and Restructure Performance Reports¹⁶

Better organize evaluation reports to achieve the following objectives:

¹⁶ See comments in Appendix J provided by RIDES.

- Identify the purpose of each report and structure the data within the report to meet that purpose.
- Identify the primary audience of each report and structure the report to address the informational needs of that audience.
- Develop the reports so that, together, they tell the full story of the Regional Rideshare Program.
- Develop the reports so that, individually, they stand on their own and tell a key piece of the Regional Rideshare Program story.
- Develop a high-level summary report so that, at a glance, readers can understand the number of placements made and vehicle trips reduced.
- Summarize the program's job performance (e.g. Tier 2 targets) in one reporting document (Figure 3-7 in Chapter 3 is an example.)

Figure 9-4 Recommended Reporting Strategy

Level of Quantitative Detail	Report	Audience	Purpose	Key Element(s)
	Annual Report	Elected Officials, High level stakeholders	Convey value of program Highlight program accomplishments	High-level outcome based summary statistics Cost-per-unit data Trend analysis Features on program elements
<div> <div>Less Detail</div> <div> <div></div> <div>More Detail</div> </div> </div>	Quarterly Stakeholder Report	Interested elected officials, High level stakeholders	Convey value of program	Tier 1 Outcome-based measures
	Monthly Report Card	Funding Partners, MTC	Convey value of program; Convey progress toward meeting contractor targets Trend Analysis	Tier 1 Outcome-based measures Progress toward meeting Tier 2 targets
	Program Activity Report	MTC, Internal	Program development	Additional tier 4 outcomes that explain the impacts of program elements Accomplishments by work plan element
	Matchlist & Non-Matchlist Client Survey Results	Any interested party	Document how key tracking statistics are produced	Provide the greatest level of background data to show how the RRP produces the information in the quarterly stakeholder report

Report Placements More Clearly

How results are presented is critical to conveying the value of the program and to building trust among funding partners about what is being reported. The table shown in Figure 9-5 is a recommended way to explain placements in as simple a manner as possible. The footnotes provide background information without cluttering the output.

(Note: The numbers shown in Figure 9-5 are *actual* placements calculated in FY02. Placements from “regional, non-commute trips” are shown as a separate line-item to demonstrate how the impact of this service market might be presented. Actual placements for regional, non-commute trip services are not included in Figure 9-5, since these were not part of the RRP in FY02.)

Figure 9-5 Recommendation: How to Report Placements

	Estimated ¹⁷ YTD Placements	Placement Type as a % of Total FY02 Placements YTD
Matchlist Clients ¹⁸		
Trial Placement ¹⁹	1,984	7.86%
On-Going Placement ²⁰	2,665	10.56%
Maintenance Placement ²¹	2,837	11.24%
<i>Subtotal People Placed in Matchlist Client Placements</i>	<i>7,486</i>	<i>29.66%</i>
Non-Matchlist Clients ²²		
Trial Placement	2,186	8.66%
On-Going Placement	1,561	6.19%
Maintenance Placement	1,286	5.09%
One-Time Non-Commute Trip Placements ²³	<i>(#s not provided, because regional, non-commute trips were not part of the program focus in FY02)</i>	
<i>Subtotal Non-Matchlist Client Placements</i>	<i>5,033</i>	<i>19.94%</i>
Riders Placed in Vanpools	<i>706</i>	<i>2.80%</i>
Bike to Work Day ²⁴	<i>12,017</i>	<i>47.61%</i>
TOTAL	25,242	100.00%

Clearly State If Objectives Are Met

In presenting the Tier 2 measurements, the Monthly Report Card should clearly state “yes” or “no” to show if the contractor is meeting its annual objectives year-to-date. An example is shown in Chapter 3 in Figure 3-7.

Better Explain Vehicle Trip Reduction (VTR) and Vehicle Miles Traveled (VMT) Reduced

The presentation of Vehicle Trip Reduction (VTR) and Vehicle Miles Traveled (VMT) reduced should footnote the methodology and state whether the data is daily, monthly,

¹⁷ Estimated using FY01 matchlist client placement rate of 26.4% and FY01 non-matchlist client placement rate of 27.4%

¹⁸ Includes anyone requesting a carpool matchlist, including those requesting through Rideshare Week pledges

¹⁹ Commuter tried non-SOV mode but is no longer in non-SOV mode at time of monitoring survey; trial placements may be as brief as one day

²⁰ On-going placements = change from SOV to non-SOV following service contact; person is still in non-SOV mode at time monitoring survey is conducted

²¹ Maintenance placements = change/add carpool partners, change from one non-SOV mode to another.

²² Includes anyone to whom the RRP mailed information other than a matchlist

²³ Placements for non-commute regional trips to ... (list specific purposes that met the criteria).

²⁴ These are all considered one-day trial placements.

quarterly or year-to-date. RIDES should report VMT and vehicle trip reductions consistently when reporting to the Air District or reporting to stakeholders.²⁵ Consistent reporting eliminates misunderstandings about the calculation. Although the calculation requires assumptions, using the Air District methodology is better, since different evaluation purposes use it throughout the Bay Area.

The VMT and VTR results should footnote statistics that support the development of these two calculations. These supporting statistics include HOV mode longevity and HOV mode use frequency as determined by the most-recent longitudinal survey. These document should also include citation of the date of the longitudinal survey.

Include Trend Analysis in Reporting

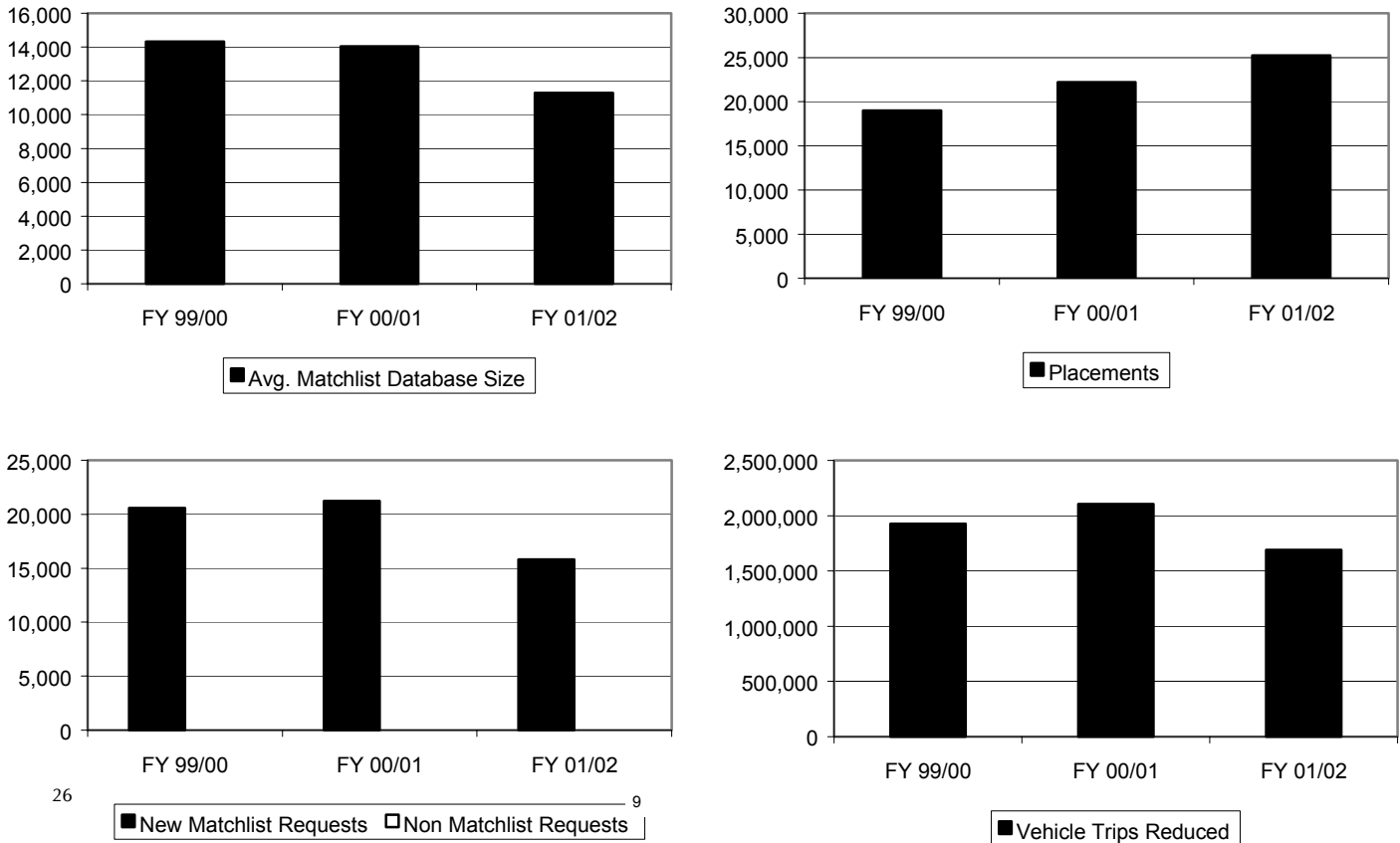
The following annual trends should be reported over a five-year period:

- Average size of ridematching database
- Number of annual placements
- Number of matchlist and non-matchlist requests
- Annual vehicle trips reduced per the Air District methodology

The trend analysis should focus on the Tier 1 statistics and be accompanied by a brief explanation of reasons for the trends. The following example, based on available program information, shows some trends from the past three years.

²⁵ In the air district formula, VMT and vehicle trip reductions calculations subtract A) the vehicle miles and vehicle trips made to access the carpool or vanpool, and B) the vehicle trips and vehicle miles generated by the pool vehicle that remains on the road. In the monthly summary reports, however, the VMT and VTR statistics do not subtract this additional travel. Thus, the monthly summary reports present gross reductions, while the air district formula presents net reductions.

Figure 9-6 Sample Annual Trend Analysis



"FY02 saw an increase in the number of placements but a decline in the average matchlist database size, new matchlists generated and vehicle trips reduced. Placements increased but Vehicle Trips Reduced declined, because of the high percentage of FY02 placements from Bike to Work Day (48%), most of which reduce a modest amount of mileage for just one day."

Provide Context in Reporting²⁷

The quarterly stakeholders report should include comparisons to help funding partners and elected officials understand the relative merits of the programs. The contextual references should change over time based on the program priorities or key accomplishments of the year. The following shows an example which was developed by RIDES.

- In FY02, the vanpool fleet averaged 763 vans. With 12 passengers per van, this represents about 18,300 passenger trips per day or 4,578,000 passenger trips per year. To provide context, this is 60% of the daily ridership on Caltrain.

²⁶ Data not available for purposes of this sample.

²⁷ See Appendix J for comment from Alameda County CMA.

Develop New Evaluation Strategies

Develop a Strategy for Tracking Non-Matchlist Client Placements

The audit recommends serving non-commute trip markets. The monitoring element should account for this new program focus. There are several challenges to evaluating service to non-commuters.

First of all, the infrequent or inconsistent nature of these non-commute trips is less conducive to forming carpool arrangements. As a result, these markets are likely to lead to a greater increase in non-matchlist requests than matchlist requests. Some funding partners believe that placements for non-matchlist clients are currently overstated. The concern is that many people with simple requests for information are counted as a non-matchlist customer served.

Recommendation: Develop criteria for the level of service that must be provided such that someone can be counted as a non-matchlist client served.

Secondly, many people calling for information may already be in carpools (e.g. families traveling to the airport). This, combined with the infrequent nature of these non-commute trips will lead to a greater increase in temporary and maintenance placements. Several stakeholders questioned the value of the regional rideshare program when placements are temporary or involve moving someone between types of alternative modes.

Recommendation: Revise placement expectations based on the expanded program focus.

Thirdly, RIDES currently counts a “non-matchlist client served” as someone to whom information is mailed. For the non-commute-trip services to be most effective, people must be provided “instant” access to information with a simple phone call or through a web site. They will not want to wait for information to be mailed to them.

Recommendation: At a minimum, keep tallies of “non-matchlist” client contacts-- Ideally each “non-matchlist” client who talks to a live operator should be asked for a call-back number for the purpose of program evaluation. Defining the focus on non-commute trips and clarifying the difference between non-commute clients and non-matchlist clients will be necessary. At that point, a specific recommendation should be made about whether to separate these two groups and how to track the levels of service within each group.

Finally, the ability of such a caller to find and use a transportation alternative is dependent *not only* on the quality of the information received, but also on the quality of the available alternatives.

Recommendation: One-time placements from this effort should be tracked as a Tier 1 measurement, but an additional Tier 2 (or Tier 4) measure should gauge the level of customer service (e.g. ease with which they obtained the information, comprehensiveness of

information, quality of experience with the RRP web site or RRP operator) to understand the contractor's contribution to this program focus.

Develop Cost Per Unit Output Measurements

Showing outcomes in terms of their cost can effectively confirm or dispel the conviction that funding is increasing while results are declining and be a powerful tool to convey program value. In addition, high-level stakeholders such as elected officials are used to seeing cost-per-unit data. Finally, cost per vehicle trip reduced is a measurement often used to look at the effectiveness of transportation demand management programs.

The following list of cost-per-unit outputs should be calculated:

- Cost per matchlist generated
- Cost per placement (and by type of placement if possible)
- Cost per vehicle trip reduced

Determining which costs to include in these calculations could be difficult. For simplicity, the total program budget awarded to the contracting agency should be used as the total cost figure. Once the recommendations to organize the work plan by function and invoice work according to these functions are implemented, it will be possible to employ a more sophisticated strategy for determining costs-per-output. In the longer term, cost per unit output could be used for specific evaluation purposes, such as the cost-per-matchlist produced by events.

Modify Existing Measurement Tools and Strategies

Maintain Annual Placement Calculation

Develop a statistically significant placement rate on an *annual* basis. Prior to FY02, a statistically significant placement rate was calculated each quarter. The cost-savings of compiling the rate annually, and the fact that the annual rate provides the most important statistic, warrants compilation of an annual, instead of quarterly, placement rate. Use the budget savings toward specific evaluations of key events, individual program elements such as the vanpool program (see page 9-19), or non-matchlist client service as discussed above.

Refine Database Survey Questions

Questions should be added to the quarterly database surveys asking matchlist and non-matchlist clients about their levels of satisfaction with the services they received. Additional questions could ask if the information received was accurate and complete or if the person providing the information was knowledgeable and courteous. The quarterly matchlist survey already asks people if the information on their matchlist was wrong. This piece of information could also be reported as an indicator of client service.

Finally, the matchlist survey could ask clients about the difficulty of knowing who to call or where to go for information about different types of commute alternatives. Such questions could better gauge progress toward Objective 2, which is to create a Regional Rideshare Program that is seamless from the customer's perspective.

Clarify Employer Outreach Objectives

Develop more aggressive employer outreach and assistance objectives for the regional program and for any county that accepts delegation of employer outreach. Recommended objectives include:

- # of employer site visits
- # of employers using customized services (e.g. web survey and TDM plans)
- # of on-site transportation events
- # of employers with links to the on-line ridematching system
- # of employers setting up unique employer databases through the regional on-line system
- # of times each employer in the employer database is contacted per year

Develop Measures to Evaluate Individual Program Elements

To support program development, the contract should continue to evaluate individual program elements, as was done for RSW in FY02. The TAC should help frame the specific problem statements the RRP should address and the questions the RRP should answer. In many cases, the contractor can design and implement the evaluation strategies, but MTC could choose to outsource these special studies.

Reorganizing the program elements within the work plan into tasks and assigning budget amounts to the different tasks will support this evaluation. As a result, evaluation efforts can determine the cost-per-placement or the cost-per-matchlist request as outcomes of specific program elements. Some specific programs that the audit recommends for evaluation include:

Bike-to-Work Day²⁸

Since placements from Bike-to-Work Day (BTWD) represent such a large portion of annual placements, the impacts of BTWD need to be better understood. The questions that need to be answered are:

- What is the reduction in SOV travel on Bike-to-Work Day?
- What is the annual reduction in SOV travel as a result of Bike-to-Work Day?

²⁸ BTWD is not included in the work plan for FY02-03.

- What is the cost per annual trip reduced from Bike-to-Work Day?

Answering these questions requires understanding the travel modes of participants prior to BTWD, and the before-and-after levels of non-SOV use of participants.

Vanpooling

To understand the value of the regional program's vanpool formation efforts, an annual survey of vanpool drivers registered in the database should be conducted. With about 800 vans in the database, this would require completed surveys from 260 randomly chosen drivers to obtain a response that has a 5% margin of error at the 95% Confidence Level. The survey would ask about the services van drivers use and the importance of those services to vanpool formation and maintenance. Survey questions could include:

- The importance of the RRP in helping to form/maintain the vanpool: critical, important, somewhat important, not important
- Use of, and ranking of importance of: on-site presentations, assistance finding riders, provision of marketing materials, finding a vehicle, understanding costs and other technical issues, formation meetings, etc.
- Use of and ranking of importance of services & information provided by: the regional rideshare program, vanpool leasing companies, local transportation demand management programs
- Time of last contact/frequency of contact with the regional rideshare program

In addition, each van in the RIDES database should have a unique identifier (e.g. a number). This number should be shared with the local agencies that have also helped to form the vanpool (if applicable). All agencies involved in the formation of the vanpool, no matter how peripherally, should be able to state that they helped to form the van. For those who are concerned about the number of agencies claiming credit for vans formed, a cross-reference between the vanpool identifiers will show if the efforts of one, two or three agencies were needed to get the van on the road. This strategy will also show the influence of local subsidy efforts combined with regional efforts.

MTC and the funding partners should assess the results in light of the annual budget for supporting vanpool formation to determine the relative importance of the program itself, and/or its individual components.

Finally, reports should communicate the definition of "van formed." Interviews with RIDES staff revealed that the RRP counts the vanpool as "formed" when the van is full. Funding partners were not aware of this, and many believe that vans identified as "vanpools" may actually only have a few riders.

Database Monitoring

The “Database Monitoring Series” designed to determine the correlation between work plan activities and placements should continue, and MTC should require the contractor to summarize conclusions and recommendations about specific work plan activities. These recommendations may be about the future of the work plan activity, the role the activity plays in the overall program or modifications to the work plan activity to improve its success. These studies should become advisory documents whereby MTC can address the strategic direction of the program. This will expand the role of these studies beyond the data compilation that they are currently. Some topics to explore include:

- The influence of database size on placement rate,
- The influence of the on-line matching on database quality and placement rate
- The influence of on-line matching on trial versus on-going versus maintenance placements, and
- The influence of non-commute trip focus on types of placements.

Employer Outreach and Services

While employer outreach and services are an important component of a regional rideshare program, understanding their impact on employee mode shift is difficult. For example, Chapter 5 of this audit concluded that most employers consider that they would have trip reduction programs regardless of the Regional Rideshare Program. At the same time, employers stated that they highly value the services provided by the regional rideshare program.

One stakeholder interviewed suggested that mode split at employers be compared pre- and post-RRP involvement. This audit does not recommend this strategy as it would be difficult to engage employers in this effort, as well as difficult to separate out the influence of the RRP. Instead, the following strategies to approximate the RRP’s influence on employee mode shift are recommended:

- Report the % of quarterly ridematching database survey respondents who state that RIDES or their employer influenced their decision to become a placement (This data is already collected by RIDES)
- Report the difference in mode split between those who work for employers who encourage trip reduction and those who do not (from Commute Profile)²⁹
- Determine the number of employers with links to the on-line ridematching form
- Track the number of employers receiving information from the RRP based on RRP contact with the employer

²⁹ A larger sample size, however, would probably be needed to produce a statistically significant difference.

- Track the number of employer sites obtaining information about, and then signing up for, the Commuter Choice tax benefit program
- Track the number of employer sites represented in the ridematching database (either with unique employer databases or those represented in the main database). The employer database could be linked to the ridematching database to assess how many employees are in the ridematching database both actively and inactively for each large employer.

Marketing

- Measure the effectiveness of outreach channels by adding a question to the on-line ridematching form that asks people how they found out about the on-line form

Implementation Plan Elements

Regional Transportation Information Broker

MTC has invested considerable effort working with regional partners on 511 identity and content. The first recommendation made by the audit was that RRP services should be identified under the 511 umbrella. In addition, the RRP should take on some program content functions that will enable “511” to be a one-stop-shop for transportation information to Bay Area travelers.

The audit recommends implementing this recommendation gradually over the next two to three years with the maturation of 511. Organizing the 511 service markets into the RRP’s service priorities to the extent that they do not overlap with currently identified RRP service markets is also necessary.

The RRP should provide the following transportation information broker services:

- For people searching for travel information who do not know anything but their starting and ending points, the RRP should be the “live voice” that either fields or directs the call/information request. The RRP is currently implementing an on-line ridematching system that will free some staff resources. These Full Time Equivalent (FTE) resources could be redirected toward providing this broader informational role. The customer service representatives will need additional training to prepare for this role.
- The RRP should provide regional transit information (i.e. TranStar services) as a backup to the information centers located at the transit operators. The 511 umbrella should well-promote these regional transit trip-planning capabilities, and they should not associated with any specific agency name.

- Information about travel to regional hubs, such as airports should be included as a service provided by the “511 one-stop-shop” information strategy, and the Regional Rideshare Program should provide this information to callers.

Ridematching

Many employers expressed the desire for internal employer-only matching capability. On the one hand, some employers may create less-effective internal databases if not offered this capability. On the other hand, employer-only matches limit the ability of matching within the regional database. Employers that do not really need to restrict matching to within the company may opt for this feature if it is too readily available. This further limits the capabilities of the regional database.

With the new, more flexible, on-line ridematching database, each individual should have the option to check whether they want to be matched only with employees of his/her company. Thus, this option does not have to be “blanket policy” within a company, but at an individual’s discretion. If a match cannot be produced using the internal-only match parameter, the on-line client should be prompted to expand his/her search to employees of any nearby company. Follow-up marketing to employers who do not respond to initial marketing about the on-line database should promote the opportunity to create internal-employer only matching.

Once the on-line ridematching database is implemented, RIDES should separate the Carpool to BART matchlist request database from the general pool of commuters. Combining these two groups has posed problems in the quality of matches in the past. Similarly, RIDES will be better able to handle matching activity in the event of emergencies with the new on-line database. In the past, the blending of people requesting matches for emergencies, such as the BART strike, negatively impacted the long-term quality of general matchlists.

Additional ridematching recommendations include:

- Focus efforts on marketing the on-line database through the 511 web portal.
- Aggressively market the on-line system to employers.
- Market the use of the database to Cities, Universities and School Districts.
- Get links to the on-line database on City transportation websites.
- Continue placement calls to those who self-register to see if they were able to find a placement.
- Continue to purge the database every five months as is the current practice.

Employer Outreach and Services³⁰

Employer outreach and services should be a separate work task within the work plan as illustrated in Figure 9-2. The audit recommends discontinuing its present structure whereby it is divided between the vanpool, marketing, and ridematching elements of the work plan.

Locally and Regionally Provided Services

Funding for employer outreach and services should be allowed to pass to the County if the County elects to accept responsibility for the following tasks:

- Identifying new employers and contacts
- Outreach to local employers through chambers, etc.
- On-Site consultations
- On-site events
- TDM planning assistance
- Facilitation of on-line mode split survey
- Vanpool formation at employer sites

The option to take on Account Representative responsibilities at the local level creates a competitive market for employer outreach. Counties with local programs will also have more control avoiding overlap between their programs and the RRP. Employer outreach and service delivery can be accomplished effectively at the local level, because much of this activity relies on one-on-one contact and an intimate understanding of the local business and transportation environment. In addition, many localities provide some of this activity already, so combining resources could result in economies of scale in service delivery.

The fact that many believe the counties would do a better job at providing employer services motivates them to accept responsibility for this function. The pass-through of funds rechannels the county's own funding sources. There should be no reason why a county would want to accept this responsibility and not accomplish a minimal level of service as this would be a waste of the county's own funding. However, if the TAC and MTC want to ensure that certain standards for employer outreach are met, acceptance of this responsibility could come with the following requirements:

- Establishing number of employer contacts
- Committing to participate in certain regional events

The funding passed through to the local level should be equivalent to the funding for the regional Account Executive FTE (or half FTE, etc). This would require the RRP to quantify Account Representative positions according to the time spent on employer outreach and

³⁰ See comment in Appendix J provided by VTA.

services versus other functions like program development, ridematching database activities, etc.

Regionally Provided Employer Services

While one-on-one, in-person assistance could be locally provided, services that should be provided regionally to all counties, regardless of delegation of Account Representative responsibilities, include:

- Developing regionally-consistent employer materials,
- Providing general information (e.g. through 511 services),
- Providing ridematching services, and
- Hosting and compiling data for the on-line mode-split survey (reps would be responsible for generating interest in using the survey and any data analysis).

Where the RRP contract continues to provide services to counties, expand the employer outreach element to become employer outreach & assistance. Assistance includes:

- On-site consultations,
- Tailored employer databases,
- Customization of the web survey,
- Employer-based TDM planning consultation, and
- Employer training.

These latter three services could be offered to employers for a fee.

In addition, the RRP should develop a strategy for employer contact, much like it develops a communications strategy each year. In some years, or in some geographical areas, the strategy might target employers along specific highway corridors, near certain BART stations, or along new bus rapid transit corridors. (In counties where the RRP is not responsible for employer outreach and services, the RRP would not develop employer contact strategies.)

The employer interviews and survey found that employers want automation and adaptability. The RRP should develop materials that can be downloaded and customized by employers. The employer survey also revealed that general information – about all modes and available services – is most valued by employers. Thus, creating the one-stop-shop and making it as easy as possible for employers to get information and materials so that they can then disseminate them to their employees is the most valuable service that the RRP can offer. This function within the 511 information system should be kept within the RRP contract. The RRP can tell an employer about all the services and options available and

provide referrals to the employer's account representative whether that person is employed and/or housed locally or within the regional program.

In addition, the program should create network access to the employer database for the county contacts and should update the employer database with an annual purge, so that its existing records are up-to-date and truly "active."

Finally, at the time of the audit, RIDES was developing information materials explaining its services to employers. RIDES should fully develop these materials.

Marketing

Website

It is critical that when users approach the RRP website, they are immediately offered options that allow them to enter the site as an individual traveler or as an employer. For this reason, an employer-only section of the website should be developed that targets content to the appropriate viewer. This is also true for events, since some people will enter the site looking to participate in the event while others will enter wanting to support event development (e.g. become an event sponsor or local organizer).

The web site must also be incorporated under the 511 web portal name, and MTC has this as a requirement in the FY02-03 work scope. The county information about mobility options should be incorporated this way as well and web information should be consistent and well-linked between local and regional programs. If there is enough concern over the content of the existing RRP website, such that other entities create their own duplicative sites (as is currently happening) it would be worthwhile for the TAC to address the issue of website content and design. The goal is to create logical internet information that best benefits the traveling public, employers and employees and capitalizes on the notion of the "one-stop-shop."

General Public Marketing

To engage more aggressively in general public marketing is beyond the limited resources of the Regional Rideshare Program. Given the budget of the RRP, the audit does not recommend shifting money from the program's current functions to general public marketing. General public marketing of the 511 identity will be imperative, but it should be done outside the scope of the Regional Rideshare Program contract. A separate contract would need to be developed (and funded) to provide this marketing service.

The audit recommends, however, that the RRP, as part of its marketing plan, use business journals to target employers and advertise the on-line ridematching database through outlets like Craigslist.org.

Employer Outreach Identity

MTC is exploring a jointly-developed identity, separate from the 511 number, for employer communication by the RRP and the counties. For employer services to be effectively coordinated between regional and local providers, however, this audit recommends that employer information also be identified as 511 and that individual provider names – RIDES, CCAN, TR@KS, The Alliance, etc – all fall under the 511 umbrella. Figure 9-1 graphically depicts this concept.

A different phone number or website address for employers erodes the “one-stop-shop” concept and decreases the power of the marketing and public information tool created by a single 511 phone number. In addition, if an employer comes to identify regional rideshare program services by a different name, phone number or website, the employer will use this identity with their employees, which will dilute the 511 identity among the general public. The audit anticipates that this will be a difficult transition. In the long run, however, delivering and obtaining information will be easier and more logical.

Commuter Choice Pre-Tax Benefits

Even if some counties take on employer-outreach functions, a Commuter Choice pre-tax benefit expert should be staffed at the regional level. A recently completed report for the Transit Cooperative Research Program entitled, “Strategies for Increasing the Effectiveness of Commuter Choice,” explains the level of expertise needed for a staff person to be effective at assisting employers. This level of expertise should be leveraged throughout the region. The RRP should consult the recently completed TCRP report for recommendations on the type of knowledge the staff person should have and for additional suggestions about assisting employers with this program. The RRP should expand information about Commuter Choice tax benefits on the employer section of the 511 RRP website (MetroPool’s website is a good model). In addition, the RRP should use local business journals, small business newsletters, etc. to expand employer awareness of Commuter Choice tax benefit programs.

Vanpooling

- Offer vanpool formation meetings as an employer service that can be delivered by the account representative.
- Include specific information about cost, how to obtain vans, medical requirements, and driver training opportunities in vanpool formation meetings. Work more collaboratively with vanpool leasing companies to be able to provide comprehensive information.
- Rely more on employer account representatives and representatives from for-profit vanpool lease companies to generate vanpool leads.
- Promote the on-line ridematching system to vanpool drivers and give them more control in pro-actively filling seats.

- List existing vans (origin/destination and travel times) on the website to better entice people to complete on-line ridematch forms.
- Provide the following on-going vanpool services:
 - Maintain an accurate database of existing vanpools
 - Provide matching opportunities
 - Put employers in touch with various for-profit vanpool companies
 - Maintain customizable marketing pieces for vanpool drivers that are downloadable from the website
 - Place vanpool information on the on-line database, so that users can see information about vans on the road and contact drivers
- Conduct a more in-depth review of the vanpool services to understand the relationship between FTEs, formation meetings, outreach, and vans formed. This should be done in conjunction with the recommended reorganization of the work plan and budget.

Regional Events³¹

Regional events are currently in transition as the program considers discontinuing or temporarily suspending Rideshare Week and Bike-to-Work Day. Based on the data reported in the FY01 Rideshare Week evaluation, the audit recommends that Rideshare Week be suspended in the coming years.

The audit recommends that the resources typically dedicated to Rideshare Week be used to promote the launch of the on-line ridematching database. It is also recommended that events target specific regional corridors as different needs or opportunities arise. The focus on corridors must rotate, and this strategy will need buy-off from the funding partners as each county will not be able to receive a “fair share” from this approach.

Special Studies and On-Going Deliverables³²

The audit recommends making special studies part of the task-billed contract. This will help define the breadth of the deliverable and allow the contracting agency to withhold payment if the deliverable’s objectives are not satisfied. MTC should require administrative drafts of deliverables to allow input from the contracting agency. The work plan should include more definition of on-going deliverables.

Special studies may be needed from RIDES to facilitate the development of a Non-Matchlist Client / Non-Commute Client evaluation strategy. The development of the task-based budget, which will need a year’s worth of cost tracking and revised administrative

³¹ See comment in Appendix J provided by VTA.

³² See comments in Appendix J provided by RIDES.

processes, might also be considered a “special study.” Research needed to prepare new programs or develop new events could also be included in future work plans as special studies.

Special Services

The audit recommends updating and monitoring transit station information signs be financed by the appropriate transit agency, even if implemented by the contractor holding the RRP contract.

Service priorities agreed upon by the TAC will define the level of service provided to agencies like schools or BART for carpool to school or carpool to BART programs. Depending on the recognized priority of these services, RIDES might offer matching capabilities, but pass along marketing and promotion responsibilities to BART. On the other hand, the TAC might direct RIDES to develop a more comprehensive program of marketing and outreach services to get commuters and parents/students interested in these ridematching opportunities.

Business Development

In some instances the strategic direction set by the TAC may require or encourage expanding the RRP service market. To the extent that the TAC feels that additional areas should be included in the RRP that are not currently included, and to the extent that the TAC supports including these areas into the contract, then the associated "business development" costs should be absorbed by the contract.

Next Steps

MTC has hired Neslon\Nygaard Consulting Associates to develop a Strategic Plan to implement the recommendations presented in this audit.

This section provides a preliminary outline of the actions that need to be taken in order to implement the recommendations of this audit. The actions are divided into those that can be undertaken by MTC, either within the contract period or in future contracts, and those that would best be instituted after development of a regional consensus. The audit recommends forming a Technical Advisory Committee that would report to the Bay Area Partnership as the forum in which to build the regional consensus.

Recommended Actions for MTC

1. Modify the contract to:
 - Redefine and prioritize the work tasks by function;
 - Define separate budgets for each work task;

- Institute task-based billing for selected work tasks; and
 - Create an incentive program tied to meeting or exceeding performance targets.
2. Establish performance objectives.
 - Develop two levels to (1) measure the impact of the RRP and (2) measure the performance of the contractor.
 - Require the contractor to restructure its reporting formats as recommended by the audit.
 3. Implement the planned 511 phone number and single web portal as “one-stop-shop” transportation information resources in the Bay Area. The RRP should be the “live voice” to field or direct callers who do not know which TDM option is best for them.
 4. Form a TDM Technical Advisory Committee (TAC) and establish the Bay Area Partnership as the decision body to which the TAC reports.

Recommended Tasks for a Technical Advisory Committee

1. Review the goals for the Regional Rideshare Program recommended in the audit, modify as needed, and recommend for adoption by the Bay Area Partnership.
2. Recommend a strategic direction for the RRP by:
 - defining local versus RRP roles and responsibilities;
 - considering the corresponding funding to carry out these defined roles; and
 - further specifying the appropriate RRP program focus between commuter and non-commuter trips as recommended by the audit.
3. Set annual priorities for the work plan.
4. Recommend job performance measurements for the contractor in meeting annual priorities.

Conclusion

This audit has evaluated the effectiveness of MTC’s contracted services under the Regional Rideshare Program. It has assessed the performance of work tasks, the level of satisfaction by stakeholders, and the quality of achievement of the program’s goals and objectives. Through implementation of the audit’s recommendations, the RRP will increase its value in regional efforts to reduce single occupant vehicle trips and better convey the value of its services to stakeholders and the public at large.

APPENDIX A

COMPLETE TARGETS FOR PEER AGENCIES

Appendix A. Peer Agency Targets

Southern California Rideshare

The FY 2001/02 objectives for Southern California Rideshare are as follows:

Survey and RideGuide Production

- 1,000 survey packets distributed to employers
- Generate 200,000 RideGuides from employer requests, with a 15% placement rate. This target is broken down by county.
- Generate 5,000 RideGuides from remote terminals at employer sites
- Maintain a 12-15 day turnaround for RideGuide production

Database Management

- Maintain an accurate database of 375,000 registrants
- Maintain working relationships with 50 vanpool clients in order to retain current information on 1,500 existing vans within SCAG's vanpool database
- Ensure that 100% of vanpool data is updated prior to 9 months of age

Transit Route and Scheduling

- Maintain an accurate database of 702 transit routes from 50 transit providers within the SCAG region
- Generate approximately 15-25 itineraries per route to verify accuracy, essentially performing a 'reality check' to ensure the suggested itineraries make sense
- Ensure that a minimum of 95% of the data received from transit agencies at least one month in advance is entered for the effective date
- Generate over 1,000,000 hits to the Transtar trip itinerary web page

Telephone Customer Information Center

- Respond to 20,000 telephone inquiries for rideshare information
- Conduct 13,000 outbound customer calls
- Provide county incentive program information and referrals to over 5,000 individuals
- Produce 18,000 RideGuides to call-in commuters
- Produce 10,000 RideGuides via Internet inquiries

Studies and Regional Marketing

- Conduct a placement rate study/evaluation [the last was completed in 1995]
- Conduct one media luncheon
- Distribute 11 issues (quantity 5,700 each) of CrossRoads newsletter
- Generate revenues from Orange County employers seeking technical and program development assistance [Orange County does not fund free employer outreach services, unlike the other counties in the SCAG region]
- Conduct a minimum of 12 site visits to Orange County work sites utilizing revenues generated by Orange County employers

Commuter Connections (DC)

The following goals are for FY 1999, when the last TERM analysis report was published. A new TERM analysis report, incorporating the current year's goals and performance, is currently being produced.

Figure 2-1 Commuter Connections TERM goals, FY 1999

	Daily Vehicle Trips Reduced	Daily VMT Reduced	Daily Tons NOx Reduced	Daily Tons VOC Reduced
Telework Resource Center	17,175	290,825	0.495	0.219
Guaranteed Ride Home	7,350	110,175	0.180	0.085
Integrated Rideshare (1)	1,018	25,075	0.0430	0.0180
Employer Outreach	7,975	123,250	0.200	0.095
Commuter Operations Center	5,109	131,613	0.177	0.078

(1) Note that the Integrated Rideshare task involves software upgrades and the establishment of automated traveler information kiosks.

Actual ridesharing is accounted for through the Commuter Operations Center.

Source: Metropolitan Washington Council of Governments (1999), Transportation Emission Reduction Measure (TERM) Analysis Report.

South Florida Commuter Services

Targets are as follows:

- 225 employer presentations
- 75 Commuter Service day events
- 25 companies participating in tax benefit programs
- 415 new client worksites served
- 14,000 names in rideshare database
- 25,250 commuters requesting assistance

MetroPool (Stamford)

Employer Services

- Expand monthly rideshare/transit referrals by 15% over 2001 levels
- Recruit five new employers into three area-wide Guaranteed Ride Home programs
- Retain current employer participants in the Guaranteed Ride Home program
- Recruit five new employers into custom Guaranteed Ride Home programs
- Form 10 new employer-based vanpools
- Assist in the implementation and marketing of eight new employer-based or publicly operated shuttles; maintain and support existing shuttles
- Maintain employee commute programs at a specified number of sites (targets set by sub-area)
- Establish new programs at a specified number of sites (targets set by sub-area)
- Recruit an average of five new participants per site
- Conduct a specified number of on-site employer Transportation Events to meet employer program needs and market area-specific transit services (targets set by sub-area)
- Place 25 new Commuter Information Center kiosks during the year, and provide new materials (flyers, brochures) for the kiosks once per month
- Place MetroPool-provided web content on ten employer intranet sites
- Seek to provide services to all employers relocating into service area
- Provide follow-up support to eight relocated firms
- Attract fifteen new participants per relocating employer
- Form two vanpools and/or shuttles under Access to Jobs initiatives
- Place one newsletter article in each of five area chambers.
- Present an overview of MetroPool's employer services during one program at each of five area chambers.
- Attain an average 300 visitors per day on the web site
- Participate in/support a minimum of six joint projects with area transportation stakeholders
- Present progress reports to RPAs at least twice per year

Commuter Services and Outreach

- Distribute 10,000 issues of The Commuters' Register at 415 outlets

- Generate a minimum 200 commuter inquiries per month
- Participate in a minimum of four joint projects with area transportation stakeholders to promote or organize new commuter services

Program Tracking and Development

- Contact every commuter in the database twice per year
- Write & publish a minimum of eight employer program profiles
- Move ten percent of employers to higher level each year after 2002

Publications

- Publish four editions of Commuter Connections and distribute to 3,500 CT contacts

Advertising/Awareness Campaign

- Increase awareness of MetroPool services by 5% as measured by area-wide telephone survey
- Participate in a minimum of 3 campaigns to support the region's transit services

Southern Connecticut Transportation Guide

- Distribute 500,000 guides to households and other outlets in New Haven County and eastern Fairfield County

Vanpool Subsidy

- Form three new vanpools with the support of the subsidy

Deduct-A-Ride (Tax Benefit Program)

- Attract 25 users per week to the web site
- Coordinate participation of a minimum of ten organizations covering the state
- Attain average of 12 participants per session; total 240 employer representatives
- Attain highest satisfaction rating for workshops from 90% of attendees
- Attain 30% implementation rate among workshop-attending employer sites
- Conduct on-site visits at 120 employer sites; 60 by MetroPool and 30 each by Rideshare and RideWorks
- Successfully implement 70 programs at visited sites; 30 in MetroPool's service area and 20 each in Rideworks and Rideshare areas

Regional Rideshare Program Performance Audit

Final Report

METROPOLITAN TRANSPORTATION COMMISSION

- Through sales outreach, promotion and education efforts, contribute to the implementation of programs at an additional 100 employer sites (cumulative)
- Establish a combined statewide total of 400 programs at employer sites
- Attain 25% awareness of commute benefits among commuters, as measured by annual telephone survey conducted under ECO project
- Receive inquiries from 400 employers about the program
- Contact 240 workshop attendees for evaluation purposes
- Conduct 500 random telephone interviews with commuters for evaluation purposes
- Contact 110 employer representatives for evaluation purposes

APPENDIX B

SOUTHERN CALIFORNIA RIDESHARE – SAMPLE RIDEGUIDE

Outside of RideGuide

Personalized RideGuide Commute Planner

SAMANTHA SAMPLE
MS-95
ACCOUNTING
A.B.C. COMPANY (9544-001)

Guia Personalizado-Plan de Comuter

Thanks for requesting a RideGuide commute planner!
Look inside for individualized information on...
Carpools • Vanpools • Bus • Rail • Park & Ride Lots
Benefits at Your Work Site • More!

SOUTHERN CALIFORNIA ASSOCIATION of GOVERNMENTS
Southern California Rideshare
848 West 7th St., 12th Fl., Los Angeles, CA 90017 3435

1-800-COMMUTE
Hearing impaired call 1-800-400-4TDD
www.socalcommute.org

Vehicle Information: Southern California Transportation Authority, Orange County Transportation Authority, Riverside County Transportation Department, San Bernardino Association of Governments, and Inland Empire Transportation Department.

Employer Benefits

Samantha Sample

Here is Your Personalized Commute Planner

you esta un plan de viaje personalizado para usted

We've created this RideGuide just for you. Based on where you live, where you're going, and your schedule, your RideGuide offers information on carpooling, vanpooling, bus, rail and more. Take a look! Then choose the ridesharing option that's best for you.

Is there a carpool lane on your commute?

Hay un carril para vehículos de ocupante múltiple en su viaje?

Carpool Lanes and Toll Roads
carreteras de ocupante múltiple y carreteras de peaje

Legend: Solid line = Carpool lanes, Dashed line = Toll roads, Blue line = Both

*Excludes toll roads in 2001

Here are Some Benefits A.B.C. Company Offers When You Rideshare:

- Carpool subsidies up to \$35.00 per month
- Transit subsidies up to \$3.00 per day
- Company-sponsored vanpools
- Preferential parking for carpools
- Bicycle racks
- Special discounts for rideshavers
- A Guaranteed Ride Home program
- Transit pass sales
- Compressed work week schedules
- Opportunities for telecommuting

Turn In Your Travel Log By The 5th Of Each Month For A Ridesharing Bonus

For more information about the commute program at A.B.C. Company, contact Jennifer Allen at (213) 555-5555 ext. 5555.

Driving Alone 5 Days a Week?

The average Southern California commuter travels 16 miles to work. If you're driving alone, this adds up to...

- 160 miles a week, 8,000 miles a year
- 62 minutes a day, 5 hours a week, 258 hours a year

Driving Alone 5 Days a Week?

■ \$3,528 a year spent on your automobile, not counting parking fees

■ 239 extra pounds of pollution in our air each year

Facts on Your Commute

Carpool Lane Information

APPENDIX C

STAKEHOLDER INTERVIEW GUIDE

Appendix C. Stakeholder Interview Guide

1. Program Content

The following chart summarizes the elements in the Regional Rideshare Program's Work Plan. In column A, "Importance Rank" please tell us how important each program element is as a function of the Regional Rideshare Program. Please rank each 1 through 5 where:

- 1 = Very Important
- 2 = Important
- 3 = Somewhat Important
- 4 = Not Important
- 5 = Don't Know/No Opinion

B. What is the best way to deliver each of the following program services in the Bay Area? Please place an X in the column to the right that best describes how you think the strategy should be delivered. If you answer "other," please explain.

A. Importance Rank	Description	B. Delivery Strategy					
		Regionally	Locally	Joint Regional & Local	Neither	Don't Know	Other
	Employer Outreach (new contacts; develop & maintain relationships; networking; etc.)						
	Media Relations						
	Printed Materials						
	Rideshare Week						
	Bike to Work Day						
	Vanpool Formation/Promotion Week						
	Internet Ridematch Campaign Promotion						
	Program Website						
	Promote & Educate Employers about Pre-Tax Commuter Benefits						
	Promote EPA Commuter Choice Leadership Initiative to Employers						
	Provide Trip Reduction Service Planning to Employers						
	Vanpool Formation and Maintenance						
	Encourage Employer Support for Vanpools						
	Develop a FasTrak Incentive for Vanpools (free bridge tolls for vanpools)						

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	Information Collection and Dissemination						
	Provide Matchlist Services (incl. Updating & Maintaining System)						
	Provide Transit Information						
	Bicycle Services (Bike Buddy Program & Bike Info)						
	Special Events (help employers organize them; attend them)						
	Carpool to Rail Program						
	Emergency Services (e.g. earthquake; BART strike)						
	Quality Control and Monitoring Program						
	Program Development (e.g. develop new concepts)						
	Commute Profile						
	Provide Regional Telephone Services						
	Program Coordination and Communication						
	County Transportation Guides (Jobs Access)						
	Assess TranStar and Take Transit Trip Planning System						
	TravInfo (provide scripts, provide live operator service)						
	Maintain Accuracy & Completeness of Regional Transportation Information Centers						
	Maintain Accuracy & Completeness of Electronic Schedule Display System						
	Provide Airport Information Services						

If you checked "other" in any of the above rows, please explain the strategy(ies) you would recommend:

Do you have ideas for how **any** of the above elements can be better delivered in the Bay Area? (Address any of those for which you have specific issues, suggestions, criticisms, thoughts, etc.)

(if applicable) Why do you have your own local TDM programs? What role do these programs fulfill that the regional program can't?

2. Other Services

What services should the RRP provide that it does not currently provide?

Do you know of other RRP's in the country that you feel provide better service to their regions that could serve as models for the Bay Area? What do those programs do differently than we do here?

3. Clients/Markets Served

Should the focus of the regional rideshare program be evenly divided between commuters and the general public or should one be emphasized over the other? How? Why?

Should the market focus of the regional rideshare program be on commute trips or all trip behavior. Why? What changes would need to be made in the RRP to do this?

Should the RRP provide different levels of service, or different services altogether, in different counties? Why? Why not? How?

4. Evaluation and Monitoring of Regional Rideshare Program

The FY01-02 objectives of the program are:

- 1,800 new matchlists generated per month
- 1,250 matchlist updates generated per month
- 1,250 placement calls made per month
- 16,000 active individuals in the database
- 20 employers per month enrolling in a Commuter Benefit program after receiving program consultation
- 5,000 active employers in marketing database
- 10,000 Rideshare Week participation pledges
- 500 vanpool driver/passenger leads during the annual vanpool promotion
- 9,000 BTW participation pledges
- 125 BTW day energizer stations organized
- 8 vanpools formed per month
- 2,500 names in Carpool to Rail database

Are these objectives reasonable? Too ambitious? Not ambitious enough? What do you think are more appropriate objectives?

Do these measurements portray an accurate picture of the results or the effectiveness of the regional rideshare program? In other words, do they provide an indication of the value for your money? Why or why not?

What other measures would you recommend to evaluate the effectiveness of the ridematching database? (Probe for specific measures). What is most important to you in understanding the effectiveness of the regional rideshare program?

The regional rideshare program objectives are established through a process between RIDES and MTC in which RIDES assesses what they were able to achieve in past years and then proposes to MTC what their objectives should be for the coming fiscal year. MTC comments on the RIDES proposal and adjustments are made. Do you think this is an effective strategy for establishing the objectives of the regional rideshare program? Do you have thoughts for different strategies that could be used to set these objectives?

How do you measure the effectiveness of the TDM efforts conducted within your county?
How do you know that what you do locally adds value?

Do you think any of the following measures are more meaningful/important, and do you think they could be measured effectively?

- Compare AVO of database members (as measured through quarterly survey) vs. general public (as measured through Commute Profile)
- Compare VTR of database members (as measured through quarterly survey) vs. general public (as measured through Commute Profile)
- Compare AMU or AVR of database members (as measured through quarterly survey) vs. general public (as measured through Commute Profile)

What about measurements targeted at employers?

5. Regional Rideshare Program Deliverables

The Regional Rideshare Program Report Card is specifically designed to provide the funding partners with a tool to monitor the success of the Regional Rideshare Program. Do you find this tool helpful? Why? Why not? What could be done to improve it?

6. Program Coordination and Communication

Does the RRP do a good job coordinating and communicating with your agency? Why? Why not?

What additional communication or coordination should the program be responsible for? What is the impression in your community (however you want to define community) of the RRP? What do you hear from employers in your area about the RRP?

Do you (does your agency) feel like you have adequate opportunity to provide input to the RRP's work plan/program?

7. The Goal of the Regional Rideshare Program

The Regional Rideshare Program's goal is to shift individuals from single occupant vehicles (SOVs) to carpools, vanpools and other transportation alternatives and help individuals sustain this shift. Is this the right goal for the Regional Rideshare Program? Do you receive enough information from the RRP to understand whether it achieves this goal?

What entities do you think should be involved in crafting the mission/vision/goals of the RRP work plan?

8. Specific Service Questions (if not addressed in Section 1)

Is the RRP effective in contacting new employers and in maintaining relationships with employers? Why? Why not?

To what extent does the new ridematching system offer the potential to rethink and redesign how the RRP's services are delivered, or what the work plan elements should be?

What could the program do better to engage employers (interest them in vehicle trip reduction programs) given its resources?

How important do you think vanpooling is to regional mobility? Is this a mode that the Bay Area should place more or less emphasis on in our regional mobility strategies? Why?

There are about 800 vanpools on the road in the Bay Area that are in the RRP's database. Does this seem like a good number of vanpools? (If not, given that we have 3.5 million commuters in the Bay Area, what should be the number of vanpools on the road?)

There are many outlets for alternative transportation information in the Bay Area (e.g. 817-1717, rides.org, travinfo.org, transitinfo.org, btwd.org, etc.). What role should the RRP play? Does it play the right role now in general public information dissemination?

How could the level of awareness of alternative transportation options and programs be improved? What role should the RRP play?

9. Conclusion/Big Picture/Last Thoughts (If not addressed in answers to previous questions)

If they have not yet been addressed, what constraints/issues does the RRP face in being able to do the best job it could?

In broad terms, how could the RRP be more effective in achieving its mission?

APPENDIX D

MTC STAKEHOLDER INTERVIEW GUIDE

Appendix D. MTC Stakeholder Interview Guide

1. What was MTC's expectation when it took over management of the RRP contract? How has the expectation differed from the reality?
2. Changes to the contract's scope of work have not been substantial over the years. Is this in keeping with MTC's original expectation? What are the barriers to changing the scope that MTC has encountered?
3. What changes to the contract would MTC like to see—for example, incentives, task orders?
4. Who is the appropriate leader for strategic direction for the RRP? Why? In setting the strategic direction, what role should these various stakeholders play?
 - Funding partners
 - MTC
 - RIDES
 - Bay Area Partnership
5. If there is a difference between what RIDES proposes as the strategic direction and what MTC would like to see as the strategic direction, how are these differences resolved? In what form is the resolution documented (e.g., verbally, in the contract, in the work plan)?
6. Where does the RRP fit into the overall regional mobility strategy? How do the responsibilities assigned to the RRP complement, or perhaps compete with, the goals for the 511 phone number and the transit trip planner?
7. What are the key elements of the RRP work plan? Why? Should the RRP focus on commute trips or all trips?
8. What are the pros and cons of the counties having their own local programs? What kind of coordination and partnership-building is needed?
9. What could be changed in the contract to encourage increased competition (i.e, to encourage other credible bids when the contract is again put out to bid)?
10. Stakeholders interviewed were generally pleased with the Commute Profile. What are the issues with the Commute Profile at MTC that we should be aware of?

APPENDIX E

RIDES STAFF INTERVIEW GUIDE

Appendix E. RIDES Staff Interview Guide

Program Evaluation

Is the number of placements or placement rate part of the reporting objectives in the work plan? If not, why?

Some have suggested measuring value by the cost per placement, in the same way transit reports cost per rider. How would/could RIDES respond to such a measurement?

All counties have expressed a desire to know the placements in carpools and vanpools from (or to) their counties. Can RIDES extract such data for them?

What measures does RIDES use that could be applied to the question, "What would happen if there were no RRP?"

How is RIDES addressing the decline in the number of people in the database from whom people can make matches?

How does RIDES evaluate client satisfaction?

How does RIDES evaluate the accuracy of the database?

Do you have the same goals/targets every year? How are these set?

The last RIDES Strategic Plan mentions a downward trend in public awareness... how did they measure that?

Placement

What is a placement? How is it defined? How is it determined? Please explain the difference between temporary, on-going and maintenance placements.

How are the Number of Vehicle Trips Reduced defined and determined?

How is "placement rate" different from "positive change"? How are "placement rate" and "positive change" different from modal shift?

What do you think is the most critical factor in effective placement?

Are placements from an event tracked separately from other placements?

The Database

How is the Quarterly Survey conducted? What is the Sample Size?

How do you define the categories of direct service that you provide to people in the database?

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Do you ask any questions in the quarterly database survey about the client's level of satisfaction with RIDES service or the quality of the matchlist they received?

Is it possible to get a break-down of the database showing the percentage of names by home city? By destination city?

Please explain the purge process. Do you ask any questions in the purge process about level of satisfaction with RIDES service?

Database Monitoring

Through these monitoring strategies, have you come to any conclusions about the relationships between the different things you track?

Have you made any changes or tweaks in the programs as a result of the findings from the database monitoring?

Has the monitoring told you anything about program elements that really seem to work?

Employer Outreach

How do you coordinate outreach to employers in counties where there is a TDM program?

What could RIDES do to better assist employers?

Should RIDES change/keep its focus away from employers? Merits? Will employers be more or less important over time?

How do account reps keep track of the contacts they have with employers? What is considered a contact? E.g. definitions; different types; etc.

How do you envision the employer database could/should be used? What is its potential?

How do account reps contact new employers? How does anyone get in the database?

Miscellaneous

How do they envision the new software impacting their operations?

Do you feel the primary market should be commuters? All travelers?

RIDES Vision is to be the regional voice for transportation alternatives. What is the plan to get to this point?

Several stakeholders have mentioned that RIDES should be the "known name" for transportation information, the one-stop-shop. What is preventing RIDES from being this?

What counts a vanpool formed? Any criteria?

APPENDIX F

EMPLOYER E-MAIL SURVEY

Appendix F. Employer E-Mail Survey

The Metropolitan Transportation Commission and RIDES for Bay Area Commuters would like your feedback on the region's Rideshare Program. Specifically, we would like to know how useful you find the transportation information services provided by RIDES in promoting commute alternatives and incentives. We would also like to know how you think we can make our transportation information and ridematching services better.

Please help us by filling out this simple e-mail survey. **It should take about five minutes to complete.** You will also be entered into a raffle to win one of four \$75 gift certificates to a restaurant of your choice. **Please return your survey by Friday May 31.**

INSTRUCTIONS:

- (1) Click on 'Reply'
- (2) Mark your choice for each question with an 'X'
- (3) Click on 'Send'

Your responses are confidential and will go directly to the survey team. Individual survey responses will not be seen by the project sponsors. If you have any questions or concerns, please contact Adam Millard-Ball on (415) 284-1544, or at amillard-ball@nelsonnygaard.com.

This survey is part of a wider evaluation of the Bay Area's Regional Rideshare Program, being conducted by the consultant group Nelson\Nygaard on behalf of the Metropolitan Transportation Commission. We are e-mailing you because our records show you have used the program's services in the past. *Your e-mail address is confidential and is not being used for any other purpose.*

Thank you for helping to improve the services of the Regional Rideshare Program.

(1) How large is your company? (If you work for a multi-site company, how large is your site?)

- (a) Less than 50 employees
- (b) 50 to 500 employees
- (c) More than 500 employees

(2) In which county is your company (or your site) located?

- (a) Alameda
- (b) Contra Costa
- (c) Marin
- (d) Napa
- (e) San Francisco
- (f) San Mateo

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- (g) Santa Clara
- (h) Solano
- (i) Sonoma

(3) What type of assistance does your company provide to encourage employees to reduce single occupant vehicle trips during the commute rush hours?

- (a) None
- (b) Modest (e.g. marketing and transportation information services only)
- (c) Moderate (e.g. marketing and information, guaranteed ride home program, prizes, non-subsidized Commuter Checks)
- (d) Robust (e.g. marketing, cash incentives for employees not to drive, shuttles, employer-sponsored vanpools)
- (e) Don't know

(4) When was the last time you had contact with RIDES for Bay Area Commuters?

- (a) Within the last three months
- (b) Within the last six months
- (c) Within the last year
- (d) Over a year ago
- (e) Don't know
- (f) Never/Don't know who RIDES is (If you select this option, you don't need to complete the remaining questions. Please send your reply to us.)

(5) What role does RIDES play in helping your company reduce single occupant vehicle trips by employees? Please select the most applicable option.

- (a) Critical. We would not have any trip reduction programs without RIDES' help
- (b) Important. It would be much more difficult for us to have our trip reduction programs without RIDES' help
- (c) Somewhat Important. It would be slightly more difficult for us to have our trip reduction programs without RIDES' help
- (d) Not important. We would have been able to implement our trip reduction efforts just as easily without RIDES' help
- (e) N/A. We don't try to reduce vehicle trips by employees
- (f) Don't know

(6) How useful has your company found the different transportation services provided by RIDES? Please indicate the usefulness of each of the following specific services *provided by RIDES*.

(i) Information on commute alternatives (*including printed materials, the RIDES website and presentations by RIDES staff*)

- (a) Very useful
- (b) Somewhat useful
- (c) Not useful
- (d) Never used this service
- (e) Did not know that RIDES offered this service

(ii) Information on commuter incentives and benefits including monetary pre-tax advantages (*e.g. Commuter Checks*)

- (a) Very useful
- (b) Somewhat useful
- (c) Not useful
- (d) Never used this service
- (e) Did not know that RIDES offered this service

(iii) Ridematching services (*helping employees to find carpool partners*)

- (a) Very useful
- (b) Somewhat useful
- (c) Not useful
- (d) Never used this service
- (e) Did not know that RIDES offered this service

(iv) Transit information services (*transit trip planning assistance including actual transit itineraries*)

- (a) Very useful
- (b) Somewhat useful
- (c) Not useful
- (d) Never used this service
- (e) Did not know that RIDES offered this service

(v) Information on bicycling

- (a) Very useful
- (b) Somewhat useful
- (c) Not useful
- (d) Never used this service
- (e) Did not know that RIDES offered this service

(vi) Vanpool services (*helping form and promote vanpools*)

- (a) Very useful

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- (b) Somewhat useful
- (c) Not useful
- (d) Never used this service
- (e) Did not know that RIDES offered this service

(vii) On-site consultations *(including transit trip planning, ridematching and helping companies establish programs to reduce vehicle trips by employees)*

- (a) Very useful
- (b) Somewhat useful
- (c) Not useful
- (d) Never used this service
- (e) Did not know that RIDES offered this service

(7) Finally, please tell us about the carpool ridematch lists that your employees may have received from RIDES. Indicate your level of agreement with the following statements.

(i) The ridematch lists had accurate information

- (a) Strongly agree
- (b) Agree
- (c) Neutral
- (d) Disagree
- (e) Strongly disagree
- (f) Don't know

(ii) The ridematch lists were provided to you or your employees quickly and efficiently

- (a) Strongly agree
- (b) Agree
- (c) Neutral
- (d) Disagree
- (e) Strongly disagree
- (f) Don't know

(iii) The ridematch lists produced sufficient names for employees to find a carpool partner

- (a) Strongly agree
- (b) Agree
- (c) Neutral
- (d) Disagree
- (e) Strongly disagree
- (f) Don't know

(iv) Many of our employees have found matches through the RIDES database

- (a) Strongly agree
- (b) Agree
- (c) Neutral

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- (d) Disagree
- (e) Strongly disagree
- (f) Don't know

(8) Do you have any other comments about RIDES for Bay Area Commuters or regional rideshare services? Please type any brief comments here.

That's the end of the survey. Thanks for your help.

Please e-mail us your response by clicking on 'Send' now, and you will be entered into our raffle. If you would prefer that we don't know who you are, you may print your response and fax it to Adam Millard-Ball at Nelson\Nygaard at 415-284-1554, or mail it to him at Nelson\Nygaard, 833 Market St, Suite 900, San Francisco, CA 94103. You will not be entered into the raffle, however, if your response is anonymous.

Your response is confidential and will not be seen by RIDES. It will be e-mailed directly to the Nelson\Nygaard survey team.

APPENDIX G

EMPLOYER SURVEY CROSSTABS

APPENDIX H

EMPLOYER INTERVIEW GUIDE

Appendix H. Employer Interview Guide

This Appendix provides the questions that were used to structure the employer interviews and focus group (Chapter 6).

Background

How large is your company/company site? Where is it? How good is the transit access? What is the nature of your company?

What are the characteristics of your employees? Do they work fixed hours? Do most own a car?

What are the broad components of your current TDM program? Do you have a dedicated TDM coordinator? How many staff work on promoting TDM? Why is the company interested in TDM (e.g. save on parking costs, improve access, provide employee benefits)?

Contact with RIDES

When was the last time you had contact with RIDES for Bay Area Commuters?

How often do you have contact with RIDES and what kind of contact is it? Whose tends to take the initiative – RIDES or you? Do you feel you have a consistent contact person to turn to?

Do you have contact with any other Bay Area agencies that promote alternative modes of transportation? Who? How often? For what purposes?

Where do you go most often for transportation information? Why? To what extent do you know where to turn each time? Any duplication/confusion?

Importance of RIDES

How important is RIDES in helping your company reduce vehicle trips?

How important was RIDES in helping your company:

- Become interested in or see the need to develop a trip reduction program
- Develop its trip reduction programs
- Develop specific components of your trip reduction program (like...?)
- Maintain its trip reduction program

How relevant do you think RIDES is to helping companies in general reduce their vehicle trips? For example:

- If it weren't for RIDES many fewer employers would have TDM programs
- RIDES is nice to have, but employers would do what they do regardless of RIDES

How do you think RIDES' services are most relevant to employers? For example:

- By serving TDM coordinators that have minimal knowledge of Transportation Demand Management
- By providing hands-on program implementation to employers
- By providing a clearinghouse of information

Is there any 'level of knowledge' that TDM coordinators need to take advantage of RIDES' services? Does RIDES cater well to experienced TDM coordinators? Those new to the field?

Do you have any sense of whether RIDES caters better to small businesses? Large firms?

Specific RIDES services

Has your company has used or participated in the following RIDES' services? If yes, how useful were they? If not, why not?

- Printed materials promoting transportation alternatives
- Vanpool formation and promotion
- RIDES website
- Information about pre-tax commuter benefits
- Trip reduction service planning
- Matchlist Services
- Transit information to employees
- On-site events (planning; attendance)
- Regional events (e.g. Rideshare Week, Bike to Work Day)
- Others

Do you feel you have a good understanding of what RIDES can offer your company?

What has been the most valuable service you have received from RIDES? What would you miss most if it were withdrawn? What does RIDES do best that individual employers can't?

What other services could RIDES offer that would be useful to you/your company?

Vanpools

Has RIDES helped or tried to help your company form vanpools? If yes, what type of service did RIDES provide?

How useful was this service? What more could RIDES have done?

Were any vanpools formed? Do you have any vanpools coming to your site? Do they work with RIDES? How?

Ridematch lists

To what extent do you agree with the following statements?

- The ridematch lists provided by RIDES have current information
- The ridematch lists provided by RIDES have accurate information
- RIDES provides ridematch lists quickly to people who request them
- The ridematch lists produce enough names for matching purposes
- Many of our employees' carpools/vanpools have been formed through matches produced by the RIDES database

Quality of services

How would you rate the quality of various services you have received from RIDES? Does this vary with each service?

How would you rate the quality of information and materials you have received from RIDES? How would you improve them?

Have you ever been disappointed by the quality of service you have received from RIDES? For example:

- Responsiveness to requests for assistance
- Speed of scheduling a visit
- Follow up

Any other issues/comments?